**SAP Training**

# Time Administration

# TM300

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**Notes:**

Welcome to the SAP *TM300 – Time Administration* training course.

## Prerequisites

- Prior to attending this course you should have taken the following prerequisites:
  - BEACON Overview – BC100
  - SAP Basic Navigation – BC110
  - Time Overview – TM200
  - Introduction to Time Administration – TM220

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**Notes:**

There are four pre-requisites that you must take before attending this class. Attending these pre-requisites ensures that you are prepared to learn the new processes, concepts, terms, and data entry skills that are covered in this course.

## SAP Training — Welcome

Welcome to the Time Administration course.

- Introductions

- Sign the Training Attendance Sheet

- Classroom etiquette

- Cell phones off

- No side conversations

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**Notes:**

Please make sure you receive the credit you deserve for attending class by signing the attendance sheet.

Also ensure that others have a quality training experience. Please turn your cell phones off during class so others are not disturbed. Thanks.

## Course Map

Lesson 1: Overview

Lesson 2: Quotas and System Behaviors

Lesson 3: Time Recording

Lesson 4: Advanced Time Reporting

Lesson 5: Time Evaluation

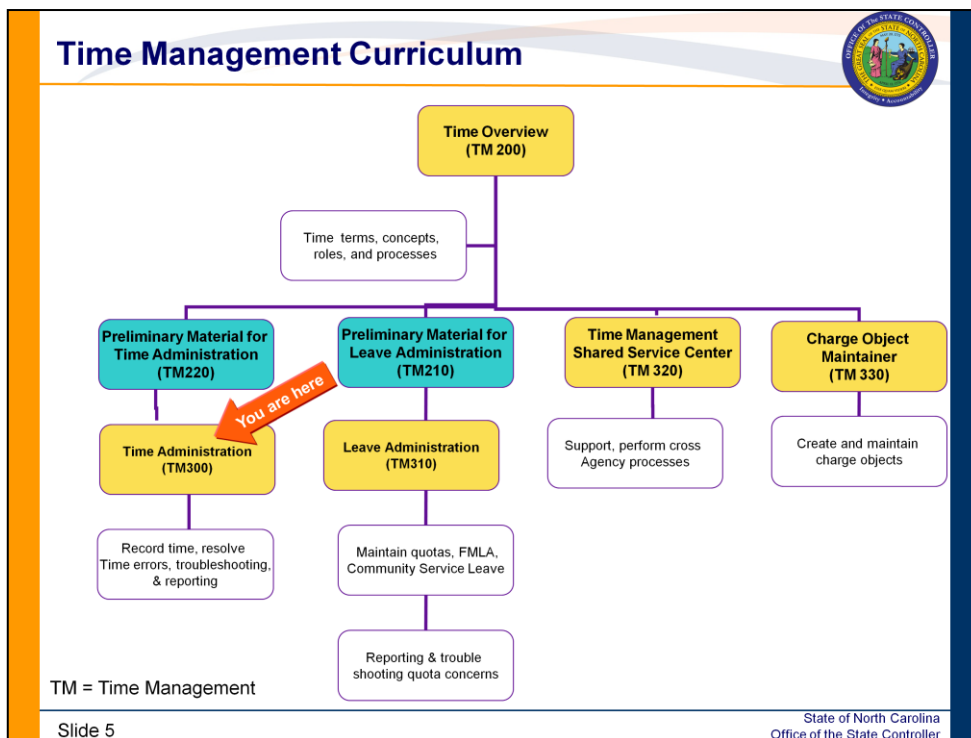Lesson 6: Reporting and Troubleshooting

Lesson 7: Connecting the OSC HR/Payroll Dots

Lesson 8: Course Review

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**Notes:**

As noted in the pre-requisites, this class is preceded by the web based course *TM220 – Preliminary Material for Time Administration*.

**Notes:**

## Course Objectives

Upon completion of this course, you should be able to:

- Describe Time Administration process
- Describe time Roles and Responsibilities
  - Time Administrators vs. ESS
- Describe how work schedules may affect quotas and pay
- Define new time recording terms and concepts
- Identify time codes using Time Administration Quick Reference Card
- Review work schedules
- Describe premium pay eligibility
- Perform review of leave quotas
- Record, review, and correct time in SAP
- Describe system behaviors
- View common time evaluation error messages
- Perform general time reporting and troubleshooting

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**Notes:**

This course is designed to provide you with knowledge and skills necessary to perform Time Administration in SAP.

## Welcome: Strategy for Training

- **Tell me**     **Concepts**
  Instructor will discuss the process, responsibilities, and describe the transactions – LISTEN

- **Show me**     **Demonstrations**
  Instructor will demonstrate Job-related tasks performed in SAP – HANDS OFF

- **Let me**     **Exercises**
  Student will complete the exercises which allows for hands-on practice in class – HANDS ON

- **Support me**     **Availability**
  Instructor will be available to answer questions while the students complete the exercises

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**Notes:**

## Reference Materials

- Student Guide
- Exercise Guide
- Job Aids
- Other resources:
  - Online Help
  - Simulations
  - Work Instructions
  - What's New

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**Notes:**

Simulations let you practice using SAP in a clearly defined and safe environment. Each simulation has instructions to guide you through the task.

Simulations are available only for select transactions.

**BEACON Online Help**

- Provides step-by-step procedures by screen
- Includes links to complete step-by-step procedures that you can print
- Includes links to simulations

To access BEACON Help from any SAP screen, select the **Help > BEACON Help menu option**

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**Notes:**

To access BEACON online help:

- http://help.mybeacon.nc.gov/beaconhelp/

## Course Map

**Lesson 1: Overview**

**Lesson 2: Quotas and System Behaviors**

**Lesson 3: Time Recording**

**Lesson 4: Advanced Time Reporting**

**Lesson 5: Time Evaluation**

**Lesson 6: Reporting and Troubleshooting**

**Lesson 7: Connecting the OSC HR/Payroll Dots**

**Lesson 8: Course Review**

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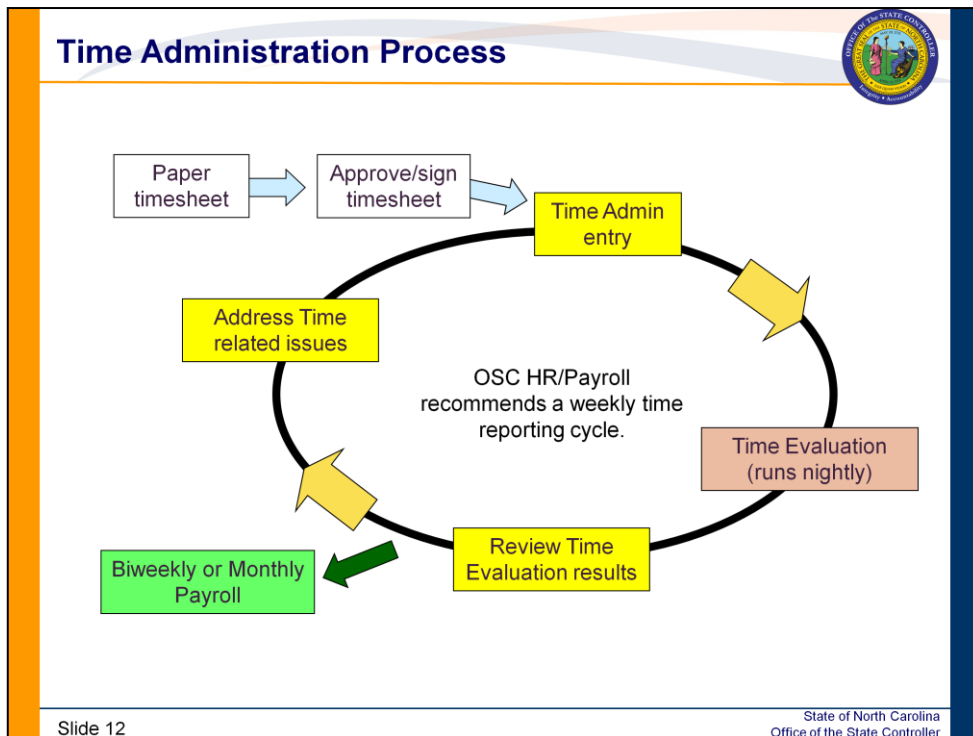Office of the State Controller

## Notes:

## Lesson Objectives

Upon completion of this lesson, you should be able to:

- Describe the Time Administration process
- Describe time Roles and Responsibilities
  - Time Administrators vs. ESS
- Define new time recording terms and concepts
- Review work schedules
- Describe premium pay eligibility

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**Notes:**

**Time Administration Process**

Paper timesheet → Approve/sign timesheet → Time Admin entry

Address Time related issues

OSC HR/Payroll recommends a weekly time reporting cycle.

Time Evaluation (runs nightly)

Biweekly or Monthly Payroll

Review Time Evaluation results

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**Notes:**

The process flow above covers the Time Administration process from the point of view of agencies using timesheets.

Time entered by an employee via ESS will be approved by a manager in the MSS Portal. Once approved, time is picked up by the nightly run of Time Evaluation, shown above in red.

Time provided by Interface will be picked up by Time Evaluation shown above.

### How is Time Entered and Approved in OSC HR/Payroll?

| Time Entry Method | Approval Method |
|---|---|
| 1. ESS Time Entry | Manager via MSS * |
| 2. Time Administrator | Supervisors sign the time sheets before submitting to Time Administrators for entry into SAP |
| 3. Interfaced Time Data | Reviewed and approved in the Agency's system before transfer |

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**Notes:**

* ESS Time may also be approved in SAP by a Time Approver. This responsibility is assigned to select Payroll Administrators and HR Master Data Maintainers. It is a backup role and intended to be performed on an exception basis.

## Terms and Concepts

- Personnel Subarea

- Calendar

- Work Schedules

- Time Management Settings

- Premium Pay

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**Notes:**

Each of the items above is a key component used by SAP to derive premium pay.

- **Personnel Subarea –** The subarea defines the employee's relationship to the State and plays an important role in their time in SAP. Will determine which days are eligible for holiday premium pay.

- **Calendar –** Assigned calendar in SAP.

- **Work Schedule –** Assigned combination of daily work schedules. Indicates when employee is expected to work. Maintained by HR Master Data Maintainer

- **Time Management Settings –** Hold key time data for position in SAP

- **Premium Pay –** Shift premiums, holiday premium, and weekend premiums that may be payable based on an employee's work schedule and/or hours recorded

## Current List of Work Schedules

- You can find the most current list of work schedules outside of SAP on the OSC HR/Payroll Training website:

  http://help.mybeacon.nc.gov/beaconhelp/index.html

  Follow this path to access the latest version of the Work Schedule job aid:

  *Human_Resources > Time > Job_Aids > Work Schedule Rule Job Aid*

- New work schedule requests should be directed to the BEST Shared Services.

- Questions about existing Work Schedules should be directed to your local HR Master Data Maintainer

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**Notes:**

**NOTE:** Not all work schedules are valid in all agencies.

**View Target Hours/Work Schedules in SAP**

- **View Daily Target Hours – CAT2**
  - You may view daily target hours using transaction Enter Time – CAT2

  **NOTE:** CAT2 does not show the work schedule rule or shift description.

- **Display Work Schedule/Shift Description – PA61**
  - You may view an employee's work schedule rule, shift description, and any active substitutions using transaction PA61.

  **NOTE:** HR Master Data Maintainers are responsible for updating an employee's work schedule.

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**Notes:**

## 1:1 - Walkthrough

- **Log On SAP**
  - You need to log on the SAP training client so you can complete course exercises.
- **Instructions**
  - Use the steps and data provided below to log on to SAP in the classroom.
  1. Access the SAP portal web page.
  2. Enter the User ID and password that is assigned to your classroom PC.
  3. Click the Log on button.
  4. Click Yes to confirm the security message displayed.
  5. Click the SAP GUI tab.
  6. Click the training client specified by your Instructor.
  7. Stop when you have reached the SAP Easy Access screen.

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**Notes:**

## Time Management Infotypes

### Employee Settings:

- The following Infotypes hold key time data specific to the employee:

| Infotype # | Name | Description |
|---|---|---|
| 0001 | Organizational Assignment | Holds organizational data such as Employee Group, Employee Subgroup, and Personnel Subarea |
| 0007 | Planned Working Time | Work schedule and working hours |
| 0315 | Time Sheet Defaults | Indicates if a timesheet is required |
| 0552 | Time Specification Employment Period | Length of Service/Prior Service. Relevant to accruals |

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**Notes:**

There are many infotypes that are relevant for Time processing.

**1:2 - Instructor Demonstration**

**Display Employee Personnel Subarea – PA61**

– You wish to view an employee's Personnel Subarea

• Infotype 0001 – Organizational Assignment

**Display Work Schedule – PA61**

– You wish to view an employee's work schedule to see their holiday schedule

• Infotype 0007 – Planned Working Times

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**Notes:**

Refer to your exercise guide for step by step instructions for this demonstration.

1:3 - Instructor Demonstration

**Display Daily Target Hours – CAT3**

You want to view an employee's work schedule as it is displayed in the Display Time (CAT3) transaction.

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**Notes:**

Refer to your exercise guide for step-by-step instructions for this demonstration.

**Time Management Settings**

Premium Pay Eligibility:

- Overtime Compensation Eligibility and Rate
- Night Shift Premium Eligibility and Rate
- Evening Shift Premium Eligibility and Rate
- Holiday Premium Rate and Payout
- Weekend Shift Premium Eligibility and Rate
- On-Call Eligibility and Rate
- Callback Eligibility
- Gap Hours Compensation

**NOTE:** These position settings stored on Infotypes 9005-9017 control premium pay eligibility.

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**Notes:**

**Overtime Compensation Eligibility and Rate (Infotype 9005) -** If time worked beyond the overtime limit (40 hours, etc) is to be paid or accumulated as compensatory time, the position must have a valid 9005 record.

**Night Shift Premium (Infotype 9007) -** Positions eligible for this premium must have a valid 9007 record. OSP approved rates other than the default of 10% must be entered in the rate field.

**Evening Shift Premium Eligibility and Rate (Infotype 9008) -** Positions eligible for this premium must have a valid 9008 record. OSP approved rates other than the default of 10% must be entered in the rate field.

**Weekend Shift Premium Eligibility and Rate (Infotype 9009) -** Positions eligible for this premium must have a valid 9009 record. OSP approved rates other than the default of 10% must be entered in the rate field.

**Holiday Premium Rate and Payout (Infotype 9010) -** OSP approved rates other than the default of 50% must be entered in the rate field. A 9010 record is only required if the Holiday Premium Rate is different than 50%.

**On-Call Eligibility and Rate (Infotype 9011) -** Positions eligible for On-Call compensation must have a valid 9011 record. The accrued box should be checked if the time is to be collected as On-Call comp time. The rate field must be populated with the OSP approved on-call rate.

Premium Pay Eligibility Flags

- Indicated on the position rather than the employee

- A check indicates that there is eligibility information for the specified infotype

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**Notes:**

**Callback Eligibility (Infotype 9012) -** Positions eligible for Callback compensation must have a valid 9012 record. The decision to pay vs. comp is determined by the Callback Accrual checkbox.

**Gap Hours (Infotype 9017)**

Positions eligible for Gap Hours Comp must have a valid IT9017 record. The decision to pay versus comp time is determined by the Gap Hours Accrual checkbox.

Gap Hours are additional hours for Subject- FLSA employees. The "Additional hours" are those hours caught in the gap between the minimum hours of work required and the overtime threshold. These hours are currently being paid at an hour-for-hour rate for Subject-FLSA employees.

The OM Master Data Maintainer is authorized to adjust Position settings using transactions PO13. The position settings can be displayed by a Time Administrator by using PO13D.

Position settings are based on Positions and Agencies must maintain consistency between similar Positions.

The use of specific premium codes is meant as an exception to the employee's regular schedule. While the system allows for premium codes, the use of these codes may invite abuse, or affect fairness among employees. Wherever possible, employees should be substituted to the appropriate shift.

**Instructor Note:**

Premiums that are explicitly coded and also derived from the shift assignment will not double up.

These are examples of the infotypes that store the Premium Pay eligibility. Eligibility may be restricted to a specific period of time by adjusting the validity date.

Time Administrators can see an employee's time management settings on the employee's Time Statement (ZNCTIME).

**Notes:**

## Premium Pay

Premium pay is calculated in SAP based on the employee's designated work schedule and their Position eligibility.

Position must be eligible and either:

The employee is assigned to a shift and recorded work hours

**OR**

The employee works some other shift and is properly substituted

**OR**

The employee records work time and uses an appropriate premium code

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The amount of premium pay is derived from the Position settings.

   9005 – OT Eligibility and Pay Provisions

   9006 – Holiday Pay Provisions

   9007 – Night Shift Eligibility and Rate

   9008 – Evening Shift Eligibility and Rate

   9009 – Weekend Shift Eligibility and Rate

   9010 – Holiday Premium Rate

   9011 – On Call Eligibility, Rate and Pay Provisions

   9012 – Callback Eligibility

   9017- Gap Hours Compensation

**Eligibility:** Usually just a check box – if checked, the employee is eligible.

**Pay provisions:** Pay it, comp it, or pay it after a specific period of time.  For example, an employee is eligible for OT, but it will be banked as Comp Time If the Comp Leave has not been taken after 60 days, it will then be paid.

**Rates:**  Some specialized Positions carry rates other than the standard 10%. An agency may designate the amount of the premium applicable for a Position.

For further information on premium pay, please consult the Personnel Manual available online at http://www.osp.state.nc.us/manuals .

**Notes:**

**Premium Pay Codes**

01 – Night Premium

02 – Evening Premium

06 – Stop Premium

**Night Shift Eligibility**

| Position | RESEARCH AN RESEARCH ANALYST I |
|---|---|
| Planning Status | Active |
| Validity | 10/17/2007 to 12/31/9999    Display change infor |

| Night Shift Premium | 01 S 599010321 |
|---|---|
| Night Shift Prem Elig | ☑ |
| Night Shift Prem Rate | 10 % |

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**Notes:**

SAP knows the days of the week. An employee that records "02" ( Evening Premium) on a Saturday would receive Evening and Weekend premium if the Position was eligible.

The default weekend behavior is from the night shift Friday night through the end of the Sunday night shift (early Monday morning).

The 06 (Stop Premium) code is meant to be used for the rare circumstance when an employee that is normally on a night shift is required to attend training during the day.

A substitution is the correct way to reflect the change in the employee's expected work hours. This code is provided as a last resort solution to avoid overpayment to the employee.

**OSC HR/Payroll Timesheet**

| EMPLOYEE: | | | | EXEMPT ___ | NON-EXEMPT ___ | | |
| PERSONNEL NUMBER: | | | | LOCATION/DEPT | | | |

| Attendance | A/A Code | Charge Object | Sun | Mon | Tues | Wed | Thurs | Friday | Sat |
|---|---|---|---|---|---|---|---|---|---|
| Time Worked | 9500 | | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| *OTHER | | | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| *OTHER | | | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ | ☐ |
| **Absence** | **A/A Code** | | | | | | | | |
| Approved Leave | 9000 | | | | | | | | |
| Holiday | 9300 | | | | | | | | |
| Sick Leave | 9200 | | | | | | | | |
| Comm. Service | 9560 | | | | | | | | |
| Comm. Service Tutoring | 9565 | | | | | | | | |
| Adverse Weather | 9545 | | | | | | | | |
| LWOP | 9400 | | | | | | | | |
| **OTHER: | | | | | | | | | |

Comments:

| *OTHER ATTENDANCE CODES | | | | **OTHER ABSENCE CODES | | | |
|---|---|---|---|---|---|---|---|
| Adverse Weather Makeup | 9512 | On-Call | 9517 | Administrative Leave | 9540 | Military Training Leave | 9620 |
| Worked Emergency Closing | 9 | Callback | 9516 | Educational Leave | 9570 | Workers Comp Leave | 9680 |
| Travel Time | 9515 | Remote Callback | 9511 | | | Injury Leave | 9685 |

PREMIUM CODES: 1 = Night    2 = Evening    6 - Stop Premium

EMPLOYEE SIGNATURE _____    DATE: _____

SUPERVISOR SIGNATURE _____    DATE: _____

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**Notes:**

In order to simplify entry into SAP, a OSC HR/Payroll timesheet has been created. This timesheet is optimized to ease data entry in the Record Time (CAT2) transaction.

An example of the OSC HR/Payroll Timesheet is on the last page of this student guide. Note that agencies may choose to adopt the new sheet, or modify it to meet their needs.

**Timesheet characteristics:**
- No running totals
- Weekly not monthly
- Personnel number
- No Social Security Number
- Attendance/Absence codes
- Premium time codes

## Positive vs. Negative Time (1 of 3)

Employees entering time will be classified as either positive or negative time.

| Employee Time Reporting Type | Description |
| --- | --- |
| Positive time/exception pay | Employees record all of their time worked and all of their exceptions such as leave taken each month. |
| Positive time/actual pay | Employees record all time worked and are paid based on actual time recorded. <br> This applies to Temporary Employees. |
| Negative time | Employees only record variations from their normal schedule, such as leave taken. Only employees "not-subject to FLSA" can be negative time. |

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**Notes:**

All employees impacted by the OSC HR/Payroll system may be categorized into one of three time-entry groupings.

**Positive Time/Actual Pay**: This means the employee must record all hours, including hours worked and leave. **Failure to record time will result in the employee not being paid.**

*NOTE: This method of time capture applies to all temporary employees, regardless for which agency the employee works. It is important to be aware that all temporary employees must enter time to receive payment. All temporary employees are paid on a bi-weekly basis and will receive pay two weeks (one pay cycle) after each timesheet has been submitted and approved following the end of the pay cycle.*

**Positive Time/Exception Pay**: This means employees must enter all time worked, as well as any absences or leave time used. **Employees receive their monthly base pay unless the Leave Without Pay (9400) code is recorded.** What this means is that Positive Time/Exception Pay employees will continue to receive their regular monthly pay unless exceptions are entered into the system. An exception could be entering the Leave Without Pay (9400) code. In this case the employee's pay would be reduced by the number of hours indicated, if the employee is below the scheduled work hours. Another exception may be for an employee who is entitled to overtime time pay and enters more than 40 hours of Time Worked (9500) into the system. This particular employee would be entitled to overtime pay, and his or her pay would reflect that.

*NOTE: All employees that are subject to FLSA fall into one of the Positive Time categories.*

## Positive vs. Negative Time (2 of 3)

Employees entering time will be classified as either positive or negative time.

| Employee Time Reporting Type | Description |
|---|---|
| Positive time/exception pay | Employees record all of their time worked and all of their exceptions such as leave taken each month. |
| Positive time/actual pay | Employees record all time worked and are paid based on actual time recorded. This applies to Temporary Employees and DOT. |
| Negative time | Employees only record variations from their normal schedule, such as leave taken. Only employees "not-subject to FLSA" can be negative time. |

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**Negative Time:** An employee must only record variations from his or her normal schedule, such as leave taken. Holiday Leave (9300) is not considered an exception.

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The Time Worked (9500) code should be used to enter regular work hours for Positive Time employees. Whether an employee works 40 hours or 50 hours, all of the work hours should be recorded as 9500

> *NOTE: If an employee is entitled to overtime pay or comp time, the system will automatically calculate this based on the hours recorded each week.*

If you have NOT been instructed by your manager or human resources department to enter all of your time, but instead to record exceptions to your work schedule, you are designated as a "Negative Time" employee. In a week when a Negative Time employee makes no entry at all, the system assumes that the employee worked the required number of hours.

## Positive vs. Negative Time (3 of 3)

Employees entering time will be classified as either positive or negative time.

| Employee Time Reporting Type | Description |
|---|---|
| Positive time/exception pay | Employees record all of their time worked and all of their exceptions such as leave taken each month. |
| Positive time/actual pay | Employees record all time worked and are paid based on actual time recorded. This applies to Temporary Employees and DOT. |
| Negative time | Employees only record variations from their normal schedule, such as leave taken. Only employees "not-subject to FLSA" can be negative time. |

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**Notes:**

When a Negative Time employee records Time Worked (9500), the system recognizes this as an exception in addition to the hours the employee was scheduled to work. It could be appropriate for a Negative Time employee to record time worked on a holiday or to record the extra few hours the employee may have worked in any given week.

A Negative Time employee should *not* record Time Worked (9500) for normal attendances consistent with their designated work schedule. Some Negative Time employees are eligible to accrue comp time. Comp time will be generated for Time Worked (9500) code when recorded by a Negative Time employee after any absences have been offset.

It is important to note that the OSC HR/Payroll system deducts approved leave according to a standard leave hierarchy (holiday comp time, overtime comp time, on-call comp time, travel comp time, vacation, bonus leave, and advanced leave). All items in the leave hierarchy fall under the Approved Leave (9000) category. For example, if an employee records an Approved Leave (9000) code, the system will automatically deduct the amount of time taken from the employee's leave quota using the established hierarchy.

Sick leave is also subject to a hierarchy (sick leave, received shared leave, and advanced sick leave).

Employees are encouraged to review the Time Entry overview guide at www.beacon.nc.gov/resources/communications.html to gain a better understanding of how time works in the OSC HR/Payroll system.

## Weekly Time Entry

All agencies are encouraged to enter time weekly - even those with a monthly overtime period.

Benefits of weekly time entry:

- Employees will receive premium pay sooner. Once entered and approved, premium pay will pay in the next available payroll.
- Accurate and timely leave accrual
- Up-to-date Time Statements and Quota Overviews
- Reduced administrative burden at the end of the period

| S | M | T | W | Th | F | S |
|---|---|---|---|----|---|---|
|   |   |   |   |    |   |   |

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**Notes:**

**1:4 - Walkthrough**

**Display Time Management Settings on the Time Statement - ZNCTIME**

– You wish to view an employee's time management settings to see if they are in a position that is eligible for overtime.

Use the simulation to demonstrate this from the BEACON Help Site.

Use the Previous Page and Next Page buttons to move through multiple time sheet statements, if multiple time sheet statements are chosen for display.

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**Notes:**

Refer to your exercise guide for step by step instructions for this walkthrough.

**Instructor Note:**

The position setting specific to an employee is found on the last page of the employee's time statement. Time Administrators may review the information and request changes through the HR Master Data Maintainer.

**Knowledge Check**

1. True or False – It is necessary to enter a premium code for all night, evening, and weekend shifts.

2. Which of the following is correct?

   A – Negative time employees record every hour worked

   B – Positive time/actual pay employees only record exceptions

   C – Positive time/exception pay employees only record exceptions

   D – None of the above

3. True or False – Weekly time entry is mandatory in OSC HR/Payroll.

4. True or False – The Time Administrator adjusts Work Schedules in SAP.

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**Notes:**

## Lesson Review

In this lesson, you learned to:

- Describe Time Administration process

- Describe time Roles and Responsibilities

    – Time Administrators vs. ESS

- Define new time recording terms and concepts

- Review work schedules

- Describe premium pay eligibility

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**Notes:**

## Course Map

Lesson 1: Overview

**Lesson 2: Quotas and System Behaviors**

Lesson 3: Time Recording

Lesson 4: Advanced Time Reporting

Lesson 5: Time Evaluation

Lesson 6: Reporting and Troubleshooting

Lesson 7: Connecting the OSC HR/Payroll Dots

Lesson 8: Course Review

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**Notes:**

## Quotas

Upon completion of this lesson, you should be able to:

- Describe Quotas in SAP
- Describe key system behaviors
    - Holiday Behavior
    - The Leave Hierarchy
    - Leave Offsetting
    - Recovery of Liabilities
    - Work Schedule Changes

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**Notes:**

## Quotas

The OSC HR/Payroll system automatically manages an employee's accruals of various quotas, including:

- Sick
- Vacation
- Community Service
- Military Leave (if applicable)

Employees using ESS can review quotas online

Employees without ESS may request a time statement with quota balances from their Time Administrator

Quota balances reflect the balance as of the last time Time Evaluation was executed. Employees recording time monthly, instead of weekly, will have balances that are not entirely current.

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**Notes:**

OSC HR/Payroll will also systematically manage deductions to these quotas. There are few special circumstances that require manual adjustments by a Leave Administrator to an employee's quota balances.

The following scenarios require manual quota adjustments via Infotype 2013:

- An employee electing to use his or her Community Service Leave for tutoring

- An employee hired into state service mid-year that is a member of the military reserve

- An employee requesting and being approved for Advanced Leave

- An employee requesting and being approved to receive Voluntary Shared Leave (VSL) donations

- An employee with a valid discrepancy in his or her quota

- Separation action zeroing out remaining balance of Vacation Quota

Quota corrections are created by Leave Administrators.

## Quota Types

| Quota Type | Quota Text |
|------------|------------|
| 10 | Vacation Leave |
| 15 | Sick Leave |
| 20 | Overtime Comp Time |
| 21 | Gap Hours |
| 22 | Holiday Comp Time |
| 24 | Travel Compensatory Time |
| 26 | On Call Comp Time |
| 31 | Advanced Vacation Leave |
| 32 | Advanced Sick Leave |
| 40 | Holiday Leave |
| 50 | Bonus Leave |
| 61 | Adv weather # hours owed |
| 65 | Community Service Leave |
| 66 | Community Service - Tutoring |
| 80 | Received Shared Leave |
| 85 | Military Leave (Training) |

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**Notes:**

Specific descriptions follow on the next pages.

**Holiday Leave** is the holiday that is due in the next 60 days, for positive time employees.  A holiday absence will reduce the amount in the Holiday Leave Quota.  Negative Time employees will not see an increase in their Holiday Quota in advance of a holiday.

**Holiday Comp** is earned when an employee works on a holiday or if the employee does not record and approve the holiday leave within 30 days of the holiday.  At that time, the system automatically moves the Holiday Leave to Holiday Comp Leave.

**Quota Accruals**

- **Who accrues?**
  - Employees with a employer/employee non-temporary relationship with the State.
- **When do Employees Accrue?**
  - Positive time employees must record time worked or leave for 50% of their scheduled work days in the pay period to accrue in that period. The accrual date depends on the number of work days, as derived from the employee's work schedule.
- **What counts for accrual?**
  - Any approved entry that puts the employee in a pay status for that day will count towards the 50% achievement.
- **What do they accrue?**
  - Hours and minutes, in decimals
- **What is prorated?**
  - Annual Leave and Sick Leave are prorated for part-time employees. Community Service leave is prorated for new hires starting after mid-January.

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**Notes:**

The accrual date depends on the number of work days, as derived from the employee's work schedule.

- For example:
  - An employee works 5 days a week.
  - There are 21 work days for this employee, on this work schedule, in the current month.
  - The employee would accrue his leave when time is entered and approved through the 11th workday of the month *.

Employees with intermittent LWOP could conceivably accrue later in the month.

Any approved entry that puts the employee in a pay status for that day will count towards the 50% achievement.

*NOTE: Only time entries that place the employee in a pay status are counted toward achievement of 50%. Any entry for Leave without pay (LWOP – A/A type 9400) will delay the accrual of leave until the employee meets 50% of the period in a pay status.*

## Accruals – When and How

**THE RULE:**
**An employee will accrue their leave when they have achieved 50% of their payroll period.**

- Employees who are Positive Time must demonstrate that achievement by recording time.

- Employees who record only their exceptions (Negative Time) will receive their accruals based on their planned Working Time.

  **NOTE:** OSC HR/Payroll recommends weekly time entry to ensure timely and accurate accruals. Agencies adopting monthly entry deadlines for their Positive Time Recording population will see a delay in the monthly accruals.

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**Notes:**

## Advanced Leave

- Agencies may elect to Advance leave in accordance with OSP Policy. Typically this is rare and for a specific purpose, not vague or casual.

- A Leave Administrator, with management approval, would create an Advanced Leave Quota for the hours awarded.

- The Advanced Leave Quota will be consumed when the employee records an absence that draws on that Quota.

- The System will generate a Liability for the employee based on the hours taken. It will recover future accruals towards that liability until it is satisfied.

- The Advanced Leave Request form is available online.

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**Notes:**

Advanced Leave is subject to the limits in the OSP Policy manual.

The recovery of liabilities is reflected on the Time Statement.

The Quota Overview (PT50) transaction has several key tabs:

- **Selection dates –** tab allows user to choose the period of time they wish to view
- **Absence quotas –** tab shows quota types and their balances (shown above)
- **Accrual information –** tabs shows accrual information
- **Attendance quota tab –** not in use

On the Absence quotas tab there are several columns showing key values:

- **Entitlement –** what is added to the quota balance through accruals, offsets, or adjustments during the display period
- **Remaining –** hours left for use by employee
- **Requested –** hours deducted

On the Accrual Information tab:

- **Generated –** calculated by the system and ready to be moved into employee's quotas during next Time Evaluation
- **Transferred –** moved into employee's quota and available for use

**Notes:**

## 2:1 - Walkthrough

### Quota Overview - PT50

You wish to view an employee's leave quotas. Access the Absence Quota tab to review quota balances.

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**Notes:**

Refer to your exercise guide for step-by-step instructions for this walkthrough.

**2:2 - Exercise**

**Time Statement – ZNCTIME**

- You wish to view an employee's Time Statement to view their quota balances.

  Use Employee 40000407 (Marva Mattox) for this exercise.

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**Notes:**

Refer to your exercise guide for step-by-step instructions for this exercise.

## Positive Time Employees

- ➢ Will see holiday leave is displayed in their quotas 30 days before the holiday

- ➢ May take the holiday from that date forward, not to exceed 30 days after the holiday

- ➢ May observe the holiday on the day it naturally occurs. This 60- day holiday period is designed to provide flexibility for agencies with 24x7 operations.

- If the holiday falls on a regularly scheduled work day and the employee is off, the employee should record 9300, Holiday Leave.

- If the employee works on the Holiday, the employee will record work hours, will receive equal time off, up to 8 hours, and the relevant holiday premium pay. The Holiday Leave (9300) will be converted to Holiday Comp Time and placed in the appropriate Leave quota.

- If the holiday falls on a non-scheduled work day, the employee may record their holiday leave (9300) on another day, an absence they should arrange with their supervisor.

**Notes:**

**Holiday Leave (continued)**

July 4th

A/A Type 9300

30 days          30 days

-----TAKE A DAY OFF SOMEWHERE IN HERE AND CHARGE 9300-----

Positive Employee will see 8 hours added to their Holiday Leave quota 30 days prior to July 4th.

If not taken, Employee will see that the Holiday Leave balance will no longer reflect the 8 hours of leave as of the 30th day after the Holiday, August 3rd.

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**Notes:**

**For Employees that do not record Holiday time within the 60-day period and who did not work on the holiday**

1) The holiday quota will be usable outside of the 60-day window.

2) If the employee did not have the benefit of the holiday, the former Holiday Leave will be converted to Holiday Comp.

3) If the employee DID have the benefit of the holiday, the previous time entries will have to be corrected to reflect it.

## Holiday Behavior – Positive Time Employees

- **Scenarios**
  - If the holiday falls on a regularly scheduled work day, and the employee is off, the employee should record 9300, Holiday Leave.

  - If the employee <u>works</u> on the Holiday, the employee will record work hours, will receive equal time off, up to 8 hours, and the relevant holiday premium pay. The Holiday Leave (9300) is automatically converted to Holiday Comp Time and placed in the appropriate Leave quota.

  - If the holiday falls on a non-scheduled work day, the employee may record their holiday leave (9300) on another day, an absence they should arrange with their supervisor.

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**Notes:**

**Holiday Leave Availability**

Holiday Leave is available in the system 30 days before the holiday and will remain available for use until 30 days after the holiday.

If the employee took the time off, but failed to reflect it on the timesheet, that must be corrected. If the employee did not have the benefit of their Holiday, the system automatically transfers the expired Holiday Leave to the Holiday Comp leave quota.

## Holidays and LOAs

- When an employee is on a LOA all holiday processing will be suspended.

- Employees that are using quotas (leave, vacation, sick) may be entitled to a holiday. The Leave Admin will be responsible for creating a quota correction record (2013) to give the employee these hours.

- When the positive employee returns from a LOA all holidays in the next 30 days will be restored.

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**Notes:**

**Holiday Behavior – Negative Time Employees**

For **Non-Subject** employees who record exceptions only:

1. The only exception for these employees is if they WORK on the holiday. Otherwise, it will be assumed that they had the benefit of the holiday.

2. Some agencies allow the employees who normally work 4x10 to revert to a 5x8 schedule in the week of a holiday. This will not require a change to the employees work schedule.

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**Notes:**

## Leave Offsetting

**THE RULE:**
**Leave is to cover the gap between hours worked and the minimum expected work hours.**

- When Approved Leave is taken in the same period where the employee has worked additional hours, the amount of leave taken will be offset with the additional work hours, and the leave that had been recorded will be restored to the employees quota for later use.

   **Example:** A Positive Time employee with a normal 5 X 8-hour work schedule works 4 ten-hour days and takes 8 hours of leave on Friday.  In this scenario the 8 hours of leave will be restored to the employee's Approved Leave quota and the employee will be paid for 40 hours.

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**Notes:**

For more information about the OSP Leave Offsetting policy please consult the Leave policies:

http://www.osp.state.nc.us/manuals/manualindex.htm

Leave Offsetting (continued) — Slide 50

40 HOURS – MINIMUM REQUIRED WORK HOURS

| Monday | Tuesday | Wednesday | Thursday | Friday |
|---|---|---|---|---|
| 8 HOURS APPROVED LEAVE | 10 HOURS WORKED | 10 HOURS WORKED | 10 HOURS WORKED | 10 HOURS WORKED |

Approved Leave, Sick Leave and Community Service Leave will be offset when the employee achieves his expected work hours in the same OT period in which leave was recorded.

**Notes:**

Quotas with established limits will be offset, except for holiday, civil and other management approved leave.

Entries made for Leave in excess of the minimum required work hours will automatically be restored to the employee's leave quota balances.

Leave restoration will be *first taken, first restored*. If a weekly employee takes Approved Leave on Monday, and then a day of Sick Leave on Tuesday, and then works an extra 8 hours on Wednesday, the Approved Leave from Monday will be the first to be restored.

*NOTE: Leave Offsetting is done within an Overtime (OT) period. For normal, 40-hour, subject personnel, Leave Offsetting will be done within the 7-day OT period. For 28-day employees, the entire 28-day period is subject to offsetting.*

## View Leave Offsetting

| Description | Beg. Balance | Accrued | Used | Paid | Expired | Offset | End Balance |
|---|---|---|---|---|---|---|---|
| Vacation Leave | 20.00 | 15.17 | 0.00 | 0.00 | 0.00 | 0.00 | 35.17 |
| Sick Leave | 42.00 | 8.00 | 0.00 | 0.00 | 0.00 | 16.00 | 50.00 |
| Overtime Comp Time | 0.00 | 8.00 | 0.00 | 0.00 | 0.00 | 0.00 | 8.00 |
| Holiday Comp Time | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 8.00 |
| Holiday Leave | 16.00 | 0.00 | 16.00 | 0.00 | 0.00 | 0.00 | 0.00 |
| Community Service | 0.00 | 24.00 | 0.00 | 0.00 | 0.00 | 0.00 | 24.00 |

Leave Offsetting is highlighted in the Absence Entitlements section of the Time Statement.

Offsets are shown in the Offset column.

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**Notes:**

The CATS time entries will not be changed – only the results will reflect the offset

Leave taken will show in as 'used' on the Time Statement.

When the employee records additional work hours, the leave taken will be 'offset' by the additional hours.

The leave quota will show a beginning balance, accrued, used, offset, and an ending balance.

**Leave Hierarchy – Approved Leave**

A/A Type 9000

1. Holiday Comp    2. OT Comp    3. Gap Hours    4. On-Call Comp

5. Travel Comp    6. Vacation    7. Bonus Leave    8. Advanced Leave

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All absences recorded as **'9000  - Approved Leave'** will be subject to this **Leave Hierarchy**.  The Leave Hierarchy reflects the order in which leave balances will be deducted when an entry for an Approved Absence is approved and transferred at night.  At the point of entry, the quotas are checked in succession until enough quota is found to cover the recorded absence. The system will only return a message 'no quota available' if it has checked each bucket and not found a balance to cover the absence.

The quotas will be automatically deducted in this order.

1) Holiday Comp
2) OT Comp
3) Gap Hours
4) On-Call Comp
5) Travel Comp
6) Vacation
7)  Bonus Leave
8)  Advanced Leave

For more information about OSP Leave policies, please refer to the OSP website:

**http://www.osp.state.nc.us/manuals/manualindex.htm**

**Notes:**

The **Sick Leave Hierarchy** represents the order in which the system will deduct quotas when an entry of 9200 is recorded. Like the Approved Leave Hierarchy, the quotas are checked at the point of entry, and the quotas are deducted when time is approved and transferred.

## Recovery of Liabilities

- **Adverse Weather**
  - If an employee has an outstanding Adverse Weather liability and works additional hours, the additional hours are used to pay back the liability until it is satisfied.

- **Advanced Leave**
  - As leave is accrued, it is used to satisfy an outstanding Advance Leave liability of the same type (e.g., vacation accruals are used to pay back vacation advances).

  - If an employee has an outstanding Advanced Leave liability and works additional hours, the additional hours are used to pay back the liability until it is satisfied.

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**Notes:**

**Adverse Weather**

- Absence due to adverse weather is entered using the Adverse Weather A/A type – 9545.

- During Time Evaluation this A/A type will cause the creation of an adverse weather liability.

- During subsequent Time Evaluation the system will check for the Adverse Weather Make-up A/A type – 9512 or additional hours worked.

- The adverse weather liability will be reduced accordingly when either is present.

## Recovery of Liabilities (continued)

- **Adverse Weather**
  - If an employee has an outstanding Adverse Weather liability and works additional hours, the additional hours are used to pay back the liability until it is satisfied.

- **Advanced Leave**
  - As leave is accrued, it is used to satisfy an outstanding Advance Leave liability of the same type (e.g., vacation accruals are used to pay back vacation advances).

  - If an employee has an outstanding Advanced Leave liability and works additional hours, the additional hours are used to pay back the liability until it is satisfied.

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**Notes:**

**Advanced Leave**

- OSP policy allows advanced leave to be granted to employees provided it is formally approved by the employee's Agency. With proper approval, an employee can receive advances of Sick and Vacation leave in amounts not exceeding that which an employee will accrue within the remainder of the calendar year.

- Due to the fact that an employee cannot maintain negative leave balances in OSC HR/Payroll, a Leave Administrator will create a separate Absence Quota equal to the approved amount of Advanced Leave.

- When the Advanced Leave quota is reduced, the system will create and manage a separate Quota to represent the liability that the employee owes the State by using leave in advance of accruing it.

- As leave is accrued, the liability is then reduced accordingly.

- All outstanding leave liabilities will be recovered (by docking or offsetting with another leave type) on December 31st.

## Work Schedule Changes

- **When to change Work Schedules**
  - On the first day of the pay period

- **Why to change the first day of the pay period**

  - Calculation issues

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**Notes:**

If at all possible, change work schedules on the first day of a pay period so that the entire pay period contains the same work schedule.

If it is not possible to wait until the next pay period to change the work schedule rule (i.e., promotions, LOA w/pay, etc.), it is permissible to change the work schedule within a period. If the change is made on a day other than the first day of the pay period, the calculation for achievement of 50% for that period may be affected.

*NOTE: All FLEX schedules assume Monday-Friday are work days for the calculations related to the achievement of 50%.*

## Knowledge Check

1. True or False:
   – Accruals are calculated and entered by the Leave Administrator once an employee reaches 75% of their work schedule.
2. True or False:
   – Employees using ESS can review quotas online.
3. True or False:
   – An employee may choose the order leave is applied.
4. True or False:
   – Bonus Leave is the first type of leave consumed in the leave hierarchy.
5. True or False:
   – Both positive and negative time employees must report hours worked on a holiday.

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**Notes:**

## Lesson Review

In this lesson, you learned to:

- Describe Quotas in SAP
- Describe key system behaviors
    - Holiday Behavior
    - The Leave Hierarchy
    - Leave Offsetting
    - Recovery of Liabilities
    - Work Schedule Changes

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**Notes:**

**Course Map**

Lesson 1: Overview

Lesson 2: Quotas and System Behaviors

**Lesson 3: Time Recording**

Lesson 4: Advanced Time Reporting

Lesson 5: Time Evaluation

Lesson 6 Reporting and Troubleshooting

Lesson 7: Connecting the OSC HR/Payroll Dots

Lesson 8: Course Review

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**Notes:**

## Lesson Objectives

Upon completion of this lesson, you should be able to:

- Record, review, and correct time in SAP

- Identify new time codes using Time Administration Quick Reference Card

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**Notes:**

## Terms and Concepts

- Cross Application Timesheet (CATS)
- Data Entry Profiles
- Attendance/Absence type (A/A type)
- Multiple Selections

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**Notes:**

**Cross Application Time Sheet (CATS) –** Acronym in SAP for the Cross Application Time Sheet

**Data Entry Profiles –** Profile used during time entry to control fields available for use during time entry in transaction CAT2. Described in detail on next slide.

**Attendance/Absence type (A/A type) –** 4-digit code used during time entry to indicate the type of work or leave taken

**Multiple selections –** SAP data entry technique that allows you to enter additional values. This technique is very useful for Time Administrators who wish to enter time for more than one employee at a time.

## CAT2 Timesheet

### CAT2 Timesheet

- Not a "thing" that gets submitted or approved

- A time record

- Processed independently

- Not collected on a timesheet in the system

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**Notes:**

A timesheet is not a "thing" that gets submitted or approved. In SAP there are only time records – 2 hours on 5/2/08, 8 hours on 5/10/08, etc.

Each time record is processed for viewing independently and doesn't get collected on a timesheet in the system other than for viewing purposes. The view of seven days seen in ESS is just that – a view of seven days on which time records may or may not have been entered.

For negative time people, there is no need to enter time records in SAP except for exceptions like leave hours or extra hours beyond the normal schedule. OSC HR/Payroll will pay the employee their base pay for the month even if no time records are entered at all. No approval is required for Payroll to pay this base pay.

If "time worked" is entered for a negative time person, OSC HR/Payroll will assume they are extra hours beyond the normal work schedule and treat them accordingly. These exception records need to be approved.

**Data Entry Profiles**

- Profiles control display options in CAT2.
- List profiles allow for automatic release and approve time data on save.
- List profiles allow the entry of multiple employees.

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**Notes:**

List profiles allow for the automatic release and approval of time data on save.

All profiles, *other than ESS profiles*, will allow for the automatic release and approval of entries made by a Time Administrator. All ESS profiles will not save time data as released and approved.

If the Time Admin needs to make changes to an approved timesheet, the Time Admin must use a profile that allows changes. All profiles (except the ESS profile) allow Time Administrators to make changes to approved records.

***NOTE:*** *The assigned profile will default on the initial CAT2 screen. If a Time Administrator enters his or her own time through ESS, the Time Admin will need to change this default setting every time to an appropriate Time Administrator profile (non-ESS) to ensure the keyed entries are released and approved as expected.*

## Attendance/Absence Codes

| A/A Type | Description | A/A Type | Description |
|---|---|---|---|
| 9000 | Approved leave | 9517 | On-Call |
| 9200 | Sick Leave | 9540 | Other Management Approved Leave |
| 9300 | Holiday Leave | 9545 | Adverse Weather |
| 9400 | Leave Without Pay | 9550 | Civil Leave – Jury Duty |
| 9500 | Time Worked | 9560 | Community Service Leave |
| 9511 | Remote Callback | 9565 | Comm. Service Tutoring |
| 9512 | Adverse Weather Make-Up | 9570 | Educational Leave |
| 9514 | Work During Emerg. Closing | 9620 | Military Training Leave |
| 9515 | Travel Time 1X | 9680 | Worker's Comp Leave |
| 9516 | Callback | 9685 | Injury Leave |

* = A/A type 9400 results in docking. Use with caution.

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**Notes:**

Your instructor will lead you in a discussion of the Time Administration Quick Reference Card.

OSC HR/Payroll time entry requires the use of time codes called Attendance/Absence types:

- Classify time/leave for employees
- On OSC HR/Payroll time sheet
- Available from drop-down list in ESS
- Available from drop-down list in Record Time transaction (CAT2) in SAP.

## Time Entry Icons

| Icon | Description |
|------|-------------|
| ✏️ | **Enter Times (F5) -** Used to access time entry screen from Time Sheet: Initial Screen |
| Personnel Selectn | **Personnel Selection -** Used to access the Personnel Selection search from the Timesheet: Initial Screen |
| 📋 | **Select All Persons (Shift+F7) -** Used to select all persons on the Time Sheet: Initial Screen |
| 📋 | **Deselect All Persons (Shift+F8) -** Used to deselect all persons |
| 🔼 | **Sort Ascending (Control+Shift+F8) -** Used to Sort Ascending |
| 🔽 | **Sort Descending (Control+Shfit+F9) -** Used to Sort Descending |
| 🎨 | **Settings (F7) –** Used to view time sheet settings on the Time Sheet: Initial Screen |
| 🕐 | **Execute (F8 ) –** Used to apply personnel selection from the Personnel Selection screen |

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**Notes:**

The Time Entry (CAT2) transaction has many icons for use during time entry.

The chart above covers the icons and buttons on the *Time Sheet: Initial* screen and the *Personnel Selection* screen.

## Time Entry Icons *(continued)*

| | |
|---|---|
| (Σ icon) | **Totals Row On/Off (F6) -** Used to toggle totals view on and off on the Time Sheet: Data Entry View screen |
| (clock icon) | **Target Hours On/Off (F7) -** Used to toggle the view of target hours on and off on the Time Sheet: Data Entry View screen |
| (calendar icon) | **Weekdays On/Off (F8) –** Used to toggle the view of weekdays on and off on the Time Sheet: Data Entry View screen |
| (magnifier icon) | **Detailed Time Data (Control+F2) –** Used to view time sheet detail on a selected row of the Time Sheet: Data Entry View screen |
| (pencil icon) | **Long Text (Control+Shift+F3) –** Used to enter/view long text on a selected row on the Time Sheet: Data Entry View screen |
| (plane icon) | **Travel Expenses –** Not in use |
| (lock icon) | **Check Entries (Control+F6) –** Used to perform validation check on entries on Time Sheet: Data Entry View Screen |

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**Notes:**

The Time Entry (CAT2) transaction has many icons for use during time entry.

The chart above covers the icons and buttons on the *Time Sheet: Data Entry View* screen.

## Time Entry Icons *(continued)*

| | |
|---|---|
| | **Legend -** Used to view legend for a selected line on the Time Sheet: Data Entry View screen |
| | **Target Hours (Control+F12) -** Used to apply target hours from the employee's assigned work schedule |
| | **Reset Entries (Control+F11) –** Used to reset entries on the Time Sheet: Data Entry View screen |
| | **Insert Row (Control+F4) –** Used to insert a row for data entry on the Time Sheet: Data Entry View screen |
| | **Delete Line (Shift+F2) –** Used to delete selected line on the Time Sheet: Data Entry View screen. Cannot be undone. |
| | **Copy Row (F5) –** Used to copy a selected row on the Time Sheet: Data Entry View screen. Data may be changed after copy |
| | **Split Row (Control+F3) –** Used to split a selected row on Time Sheet: Data Entry View Screen |

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**Notes:**

The Time Entry (CAT2) transaction has many icons for use during time entry.

The chart above covers the icons and buttons on the *Time Sheet: Data Entry View* screen.

**Time Entry Icons** *(continued)*

| | |
|---|---|
| | **Save As Template (Shift+F11) -** Used to save entered data as template for future use on the Time Sheet: Data Entry View screen |
| | **Delete Template (Shift+F12) -** Used to delete a previously saved template on the Time Sheet: Data Entry View screen |
| | **Previous Screen –** Used to move view to previous week on the Time Sheet: Data Entry View screen |
| | **Next Screen –** Used to move view to next week on the Time Sheet: Data Entry View screen |
| Release view | **Release View –** Not in use. Time should be entered using the Data Entry Profiles ending in "-L" which automatically release, approve, and save time |
| | **Save (Control+S) –** Used to save data on the Time Sheet: Display Entry View screen. Time will be automatically released, approved, and saved. |

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**Notes:**

The Time Entry (CAT2) transaction has many icons for use during time entry.

The chart above covers the icons and buttons on the *Time Sheet: Data Entry View* screen.

**Time Entry Validations In CAT2**

| Immediate | On Save |
|---|---|
| A/A Codes Validity | Quota Availability |
| 24 hr limit | Collision w/ Full Day's Absence |
| | Employee Status (Active/Inactive) |

**NOTE:** Validation errors must be corrected in order to save the time record containing the error.

**Notes:**

The following validations occur during time entry using CAT2:

- Quota Availability – CAT2 performs quota check during time entry to ensure that sufficient quota is available. A time record may not be saved if an employee's quota is exceeded.

- Full-Day Absences – CAT2 checks full-day absence to ensure leave does not exceed planned work schedule.

- A/A Groupings – CAT2 checks A/A groupings to ensure that a Temporary employee does not use an A/A time code that belongs to a full-time employee.

## Time Entry Error Messages

### Check Entries Feature
- Allows you to check entries before saving

- Errors and warnings are identified for resolution

### Errors vs. Warnings
- **Errors -** Must be fixed before proceeding. Highlighted in red

  - **Example –** Invalid A/A code entered

- **Warnings -** A warning is an information message that may be heeded or ignored depending on the situation. Highlighted in yellow

  - **Example –** Number of hours entered exceed planned working times

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**Notes:**

## 3:1 - Instructor Demonstration

**Time Entry Techniques – CAT2**

This demonstration shows the following time entry techniques:

- **Target Hours –** allows you to apply the employee's planned work schedule
- **Adding lines –** allows you to insert an additional blank line for the selected employee
- **Split lines –** allows you to split the selected line, forcing the entries to the left of the cursor to a new line
- **Comments –** ability to add in comments for each entry. Can be used to capture explanatory text
- **Totals –** allows you to view totals during data entry. Alleviates need to perform manual calculations

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**Notes:**

Refer to your exercise guide for step-by-step instructions for this demonstration.

*NOTE: Comments made in the time sheet may only be viewed in the CAT2, CAT3 or CATS_DA transactions.  There is no mechanism to report on these out of the OSC HR/Payroll system.*

**3:2 - Walkthrough**

**Record Time – CAT2**

- You wish to enter time for an employee. The employee has worked her entire work schedule with no exceptions.

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**Notes:**

Refer to your exercise guide for step by step instructions for this walkthrough.

**3:3 - Walkthrough**

**Record Time with Leave – CAT2**

- You wish to enter an employee's time for the current week. The employee worked a regular schedule for Monday, took 1 day of vacation on Tuesday, and 1 day of sick leave on Wednesday.
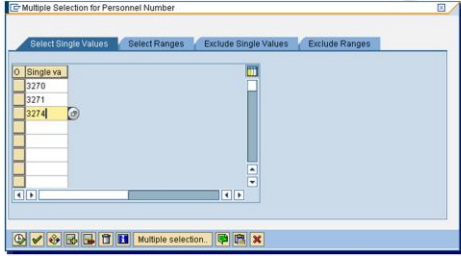
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**Notes:**

Refer to your exercise guide for step by step instructions for this walkthrough.

**Notes:**

**Tip:** When using multiple sections, you can copy and paste values such as Personnel Numbers from a list using the **Copy from Clipboard** button.

**To Copy From Clipboard during Multiple Selections:**

1. In your Word or Excel list, highlight the text you want to copy, e.g., a list of Personnel Numbers.

2. Press the Control and C keys on your keyboard to copy the list into the Clipboard.

3. In SAP, access the Multiple Selections dialog box for the field whose values you wish to load from the Clipboard.

4. Click the **Copy from Clipboard** button to paste values into the multiple selection dialog box.

**3:4 - Exercise**

**Record Time for a List of Employees – CAT2**

- You need to enter time for a group of employees. Enter the complete work schedule for each employee by applying the Target Hours.

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**Notes:**

Refer to your exercise guide for step-by-step instructions for this exercise.

## 3:5 - Walkthrough

### Edit Time for a List of Employees – CAT2

- You need to edit some of the entries for the group of employees whose time you just entered.

  - Employee D, Sharon Fairbank – add 2 additional hours worked on Monday, Tuesday, and Wednesday

  - Employee B – change Thursday's previously recorded approved leave to Leave without Pay

  - Employee C – add shift premium time and change previously recorded leave

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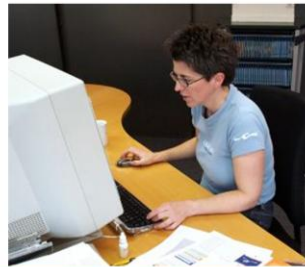Office of the State Controller

**Notes:**

Refer to your exercise guide for step-by-step instructions for this walkthrough.

**3:6 - Exercise**

**Record Leave in Advance – CAT2**

• You have received a leave request from an employee for next week. You will be out of the office next week so you want to go ahead and enter it in the system. The employee is a Negative time employee.

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**Notes:**

Refer to your exercise guide for step-by-step instructions for this exercise.

## Correcting Entries

- Entries may be corrected in previous records. OSC HR/Payroll business practices will determine how far back you can go to make corrections.

- Approved changes are picked up the next time that Time Evaluation is run.

- Only Time Administrators can change entries for ESS users when the time has already been approved via MSS.

- ESS users can correct time until the time is approved in MSS.

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**Notes:**

Agencies will decide how far back they want to go to make corrections. Retroactive calculations require every subsequent period to be re-processed.

**To make a time correction:**

1. Access employee time entry via CAT2.

2. Use appropriate key date for correction. You can only scroll forward or backward a certain number of weeks.

3. Adjust entries as needed.

4. Save.

**3:7 - Exercise**

**Correcting Entries – CAT2**

- You want to correct entries you recorded for an employee in a previous exercise. Instead of 2 additional hours each day, the employee worked 2.5 hours each day.

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Refer to your exercise guide for step-by-step instructions for this exercise.

**Notes:**

## Tending to ESS Employees

- Failure to Release Time
  - ESS Time must be released by the employee before it can be approved by the supervisor.
  - Time Approvers may approve time if the Manager fails to do so. Time Administrators cannot approve ESS entries.
  - Time administrators can enter time in SAP for ESS users that cannot make entries. Time entered by the Time Admin on behalf of an ESS user is saved as approved time. It would be an exception to normal procedures.

- Corrections After Approval
  - Time Administrators can make approved changes.

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**Notes:**

Display Working Times (CATS_DA) may be run for time that has been not released. Run the report using the Personnel number and restrict the display to the Processing Status 20 – time Released for approval.

To resolve the unapproved time, contact the Manager and request they use the Manager Self Service (MSS) Portal to approve.

Alternatively, if the manager is not available, the backup Time Approver may use Approve Time (CATS_APPR_LITE) to approve the time directly in SAP.  This responsibility is given to some Payroll and HR Master Data Administrators in agencies using ESS.

A Time Approver Quick Reference Card, online work instructions, and simulations are available in BEACON Help to support this process.

## Knowledge Check

1. True or False:
   - Time cannot be corrected after payroll for that period is complete.

2. True or False:
   - Time Administrators should only choose data entry profiles designated as list.

3. True or False:
   - Time Administrators must approve ESS time that has been released but not approved by a Manager.

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**Notes:**

**Lesson Review**

In this lesson, you learned to:

- Record, review, and correct time in SAP

- Identify new time codes using Time Administration Quick Reference Card

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**Notes:**

## Course Map

Lesson 1: Overview

Lesson 2: Quotas and System Behaviors

Lesson 3: Time Recording

**Lesson 4: Advanced Time Reporting**

Lesson 5: Time Evaluation

Lesson 6: Reporting and Troubleshooting

Lesson 7: Connecting the OSC HR/Payroll Dots

Lesson 8: Course Review

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**Notes:**

## Lesson Objectives

Upon completion of this lesson, you should be able to:

- Describe Substitutions

- Describe 2012s

- Describe use of charge objects

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**Notes:**

## Terms and Concepts

- Substitutions
- 2012s
- Charge Objects
- Variants

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**Notes:**

**Substitutions –** Over-writing daily work schedule with new shift schedule. Used when an employee makes a shift change that is premium pay relevant. Refer to the OSP policies for questions about substitutions.

**2012s –** Individual Time Management Specifications are used to affect an employee's pay.

**Charge Objects –** Charge Objects offer a way for agencies to track hours against projects, funds, grants and programs. Charge Objects may also include details about activity types and/or specific tasks. Hours recorded to Charge Objects will be available for reporting. Reporting the cost of those hours recorded to a particular Charge Object is not supported in OSC HR/Payroll

**Variants –** A Variant in SAP is a set of saved selection criteria to be used during data entry or reporting. Described in detail on slide following the Data Entry Profile slide.

## Substitutions

- Premium pay – derived from Work Schedule

  - Employee is eligible

  - Employee is on a shift pay relevant work schedule

  - Employee will receive shift pay for hours recorded on scheduled work days

  - Non-scheduled work days do not carry shift designations

- Premium pay – derived from Substitution

  - Employee is eligible

  - Employee's daily work schedule is substituted for a premium eligible shift

  - Employee will receive shift pay for hours recorded on that day

*(Continued)*

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**Notes:**

These are ways that employees get premium pay. The position must be eligible, and the employee must work the hours and have the right schedule. Substitutions are done for an entire shift.

## Substitutions (continued)

- Premium pay – derived from push codes

  - Employee is eligible

  - Employee hours are recorded with a push code

  - Employee will receive shift pay

- Push codes – slang for the premium number on the timesheet screen.

  - Used to indicate which hours should receive the Night or the Evening Shift premium.

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**Notes:**

**Risks** – Using push codes instead of proper shift assignment or substitution creates a risk of inequity among employees of the same class on the same shift.  The best practice is to use substitutions or a work schedule change via the HR Master Data Maintainer rather than push codes.

**Push Codes** - Slang for the Premium Number on the timesheet screen.  It is used to indicate which hours should receive the Night or the Evening Shift Premium.  There is also a Premium Number value that indicates time eval should Stop Premium for those employees whose indication of premium payment is triggered behind the scenes by their assignment to a shift premium designated work schedule.

For example, if someone worked 8 hours of a normal day schedule and 1 hour in the evening, they would use the Evening Premium code (or push code) on a second line for that 1 additional hour to mark it as being worked in the evening.  If the person is on an evening schedule, their position work schedule is already marked as evening premium eligible.  If they come in an hour early in the day schedule time frame they would enter a second line with that hour and mark it with a Stop Premium code if that 9th hour is not eligible for a premium.  This may vary by agency.  There are three premium codes right now: Night Premium, Evening Premium, and Stop Premium.

## Substitutions (continued)

- The Daily Work Schedule is overwritten with properties of the Substituted schedule. Employee may then:
  - Record work time
  - Record leave time

- Examples of Daily work Schedules:
  - 1D08   Day Shift – 8 hours
  - 1E08   Evening Shift – 8 hours
  - 1N08  Night Shift – 8 hours

- Weekends
  - The system always knows weekends.  Weekends start with Night shifts on Friday.  An employee that records work time on Saturday who is eligible for Weekend premium pay will receive weekend premium pay without a substitution.

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**Notes:**

Substitutions may be daily, or may be for weeks at a time.

## 4:1 - Instructor Demonstration

**Substitute Work Schedule – PA61**

- An employee who works nights is asked to work extra shifts on her day(s) off. Her position is defined as Night Premium eligible. All hours worked will receive night shift premium automatically. If she works any hours of day shift, the Create Work Schedule Substitution process has to be used to record her hours as Non-Night Shift Premium eligible. She is a Negative time employee who is working her regularly scheduled days off. Therefore, you must record her time for any time she has worked on her days off.

- To ensure proper shift premium is received, perform daily substitutions to make the days off to normal work days. The substitutions should be made for Sunday and Monday which are her standard days off.

**NOTE:** Ensuring that employees are substituted properly when they work at times other than their planned work schedule is very important.

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**Notes:**

Refer to your exercise guide for step-by-step instructions for this demonstration.

**4:2 - Exercise**

**Substitute Work Schedule – PA61**

- An employee who works nights is asked to work extra shifts on her day(s) off. Her position is defined as Night Premium eligible. All hours worked will receive night shift premium automatically. If she works any hours of day shift, the Create Work Schedule Substitution process has to be used to record her hours as Non-Night Shift Premium eligible. She is a Negative time employee who is working her regularly scheduled days off. Therefore, you must record her time for any time she has worked on her days off.

- To ensure proper shift premium is received, perform daily substitutions to make the days off to normal work days. The substitutions should be made for Sunday, Wednesday, and Saturday which are her standard days off.

**NOTE:** Ensuring that employees are substituted properly when they work at times other than their planned work schedule is very important.

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**Notes:**

Refer to your exercise guide for step-by-step instructions for this exercise.

After making a Substitution, access CAT2 to verify the work schedule substitution is correct.

## 2012s Individual Time Behaviors

- These are Personal Time Transfer Specifications that can affect an employee's pay.

- Used to turn on or off pay relevant behaviors for individuals

- Used to track start and end dates for incentive pay contracts

- Used to isolate employees with exceptions to routine time (OT and /or leave accruals)

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Because 2012s can affect employee pay, they are maintained by the HR Master Data Maintainers. As Time Administrators, is it important to know that they exist, but you will not have the ability to create or change them.

**Notes:**

## 2012s Subtypes and Their Uses

| Subtype | Name | Description |
|---------|------|-------------|
| Z004 | Set Actual Pay Behavior | The Employee will only be paid for time that is recorded and approved. (Disciplinary) |
| Z006 | Holiday Ineligibility | Will suppress the holiday premium if EE is not required to work but tends to work holidays anyway. (Disciplinary) |
| Z007 | Baylor Plan – Reg (Beginning) | Records the beginning of the 6 mo contract |
| Z008 | Incentive Pay – RN (Beginning) | Records the start of the Incentive Pay contract |
| Z009 | First 10 Hours Comp | Forces the first 10 hours (over the min. required work hours) to go to the Comp Time quota, and anything over that to be paid |
| Z020 | Immediate Payout (OT) | Turns on Immediate Payout for OT for a specific date range |
| Z021 | Process Adverse Weather | |

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**Notes:**

2012s are set up by the HR Master Data Maintainer.

**Z004 – Actual pay**

Employees that are habitually absent without explanation, and for whom an assumption of full base pay would likely result in an overpayment, may be set to 'actual pay'. This would result in the employee being paid only for recorded work time.

## 2012s Subtypes and Their Uses *(continued)*

| Subtype | Name | Description |
|---------|------|-------------|
| Z025 | Commerce Monthly Longevity | Flags Commissioners with Monthly longevity entitlements |
| Z030 | NCSSM SAAO | Flags NCSSM personnel for unique rules |
| Z031 | Non-Faculty | Flags NCSSM personnel for unique rules |
| Z032 | Faculty | Flags NCSSM personnel for unique rules |
| ZZ07 | Baylor Plan – Reg (End) | Record the Contract End Date for Baylors |
| ZZ08 | Incentive Pay – RN (End) | Record the Contract End Date for RN Incentive Pay |
| ZZ18 | Baylor Plan + Bonus (End) | Record the Contract End Date for Baylors with a bonus |
| ZZ19 | Incentive Pay – LPN (End) | Record the Contract End Date for LPN Incentive Pay |

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**Notes:**

**4:3 - Walkthrough**

**Display An Employee's 2012s – PA61**

- You wish to review an employees time transfer specifications (IT 2012) infotype settings. You want to verify that her settings are correct.

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Refer to your exercise guide for step by step instructions for this walkthrough.

**Notes:**

## Charge Objects

- Agencies may use Charge Objects to track hours against projects, funds, grants, and programs.

- Hours recorded to Charge Objects will be available for reporting.

- Reporting the cost of hours recorded to a particular Charge Object is not supported in OSC HR/Payroll.

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**Notes:**

Charge Objects are entered using specific charge object data entry profiles (e.g., Charge4-L).

Each Agency will maintain its own list of Charge Objects in the SAP system.

The four levels are optional, not required. Agencies using just a single number, up to 12 digits, may continue to use just that identifier.

For additional information in reference to Charge Objects have your Training Agent register you for Web Base Training *TM330 .*

## 4:4 - Walkthrough

**Time Entry Using Charge Objects – CAT2**

- You wish to enter time for Employee B (Sarah Beckham) using one charge object.

  **NOTE:** The charge object field is free form. It is helpful to keep an Excel list of valid charge objects that may be used to copy and paste valid charge objects during time entry.

- Not every Agency will be using charge objects.
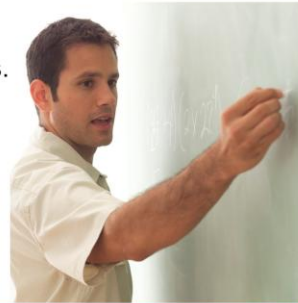
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**Notes:**

Refer to your exercise guide for step by step instructions for this walkthrough.

In this List profile, the Time Admin makes entries directly to the charge object field. It is not restricted to specific values. In ESS, an employee doing their own time entry is restricted to a "Worklist" of values they may select to charge their time.

## Variants

- A Variant in SAP is a set of saved selection criteria to be used during data entry or reporting.

- Advantages of variants:
    1. Faster entry
    2. Reduced errors
    3. May be used by more than one Time Administrator

**Notes:**

**To create a Variant for Record Time Entry:**
1. Enter Personnel numbers using Multiple Selection functionality.
2. Click **Save As Variant** button.
3. Enter Variant Name and Description.
4. Click **Save.**

**To use a Variant:**
1. Click **Get Variant** button or select menu path Goto > Variant > Get.
2. Double-click desired Variant to select.
3. SAP will populate CAT2 with Personnel numbers in Variant.
4. Modify and enter data as needed.

**NOTE:** *You may change variants by saving the new variant with the same name. The system will warn you that the variant will be overwritten.*

**4:5 - Walkthrough**

**Create Variant for Time Entry - CAT2**

- You wish to create a time entry variant for use during future time entry.

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Refer to your exercise guide for step-by-step instructions for this walkthrough.

**Notes:**

## Knowledge Check

1. True or False – Time Administrators must manually calculate premium pay.

2. True or False – SAP has a limit to the number of premium pay relevant substitutions that may be made during a given work schedule.

3. True or False – All work hours should be recorded under the 9500 A/A type.

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**Notes:**

## Lesson Review

In this lesson, you learned to:

    – Describe Substitutions

    – Review 2012s

    – Describe use of charge objects

    – Describe Variants

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**Notes:**

**Course Map**

Lesson 1: Overview

Lesson 2: Quotas and System Behaviors

Lesson 3: Time Recording

Lesson 4: Advanced Time Reporting

Lesson 5: Time Evaluation

Lesson 6: Reporting and Troubleshooting

Lesson 7: Connecting the OSC HR/Payroll Dots

Lesson 8: Course Review

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**Notes:**

## Lesson Objectives

Upon completion of this lesson, you should be able to:

- Describe time evaluation

- View common time evaluation error messages

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**Notes:**

**Terms and Concepts**

- Time Evaluation

- Time Evaluation Error Log

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**Notes:**

**Time Evaluation –** Automated nightly batch Job that reviews approved time. Time Evaluation:

- calculates planned time and overtime
- determines premium pay (shift pay, holiday premiums)
- converts recorded time into codes to be used by Payroll

**Time Evaluation Error Log –** Generated during Time Evaluation run

**Time Evaluation – What Goes In**

- OSP Policies as configured in SAP
- Position Information - FLSA Status, Time Management Settings
- Calendars, Quotas and Work Schedules
- Approved CATS records

**Time Evaluation**

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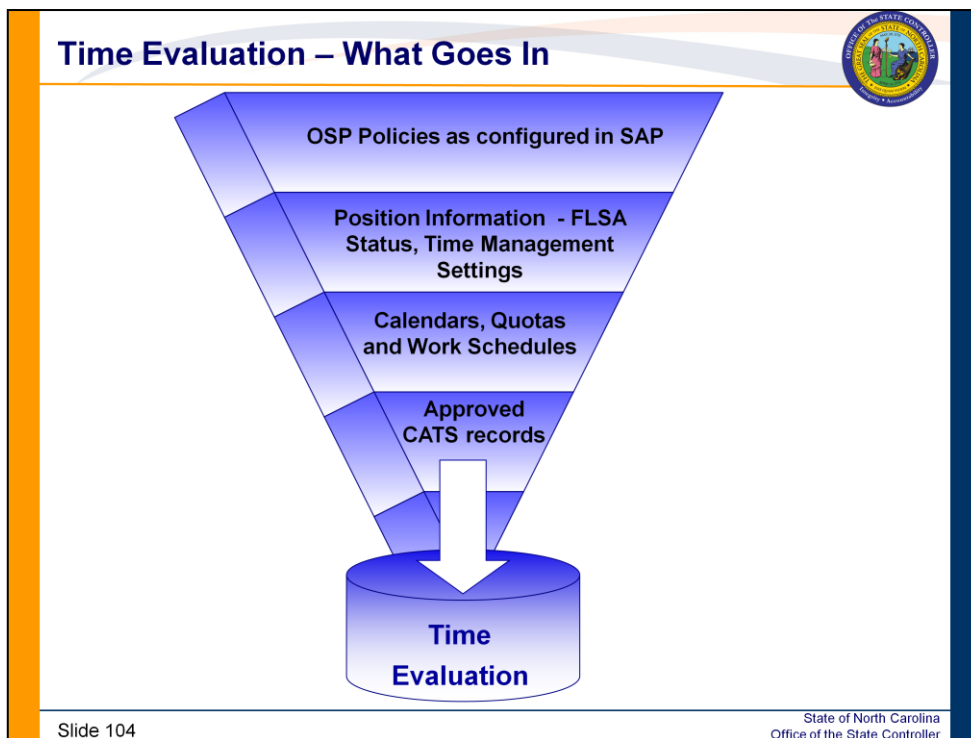
Time Evaluation determines:

- OT/Comp Time
- Premium Pay
- Leave Offsets
- Recovery of outstanding liabilities

Payroll picks up Time Evaluation results and generates pay checks.
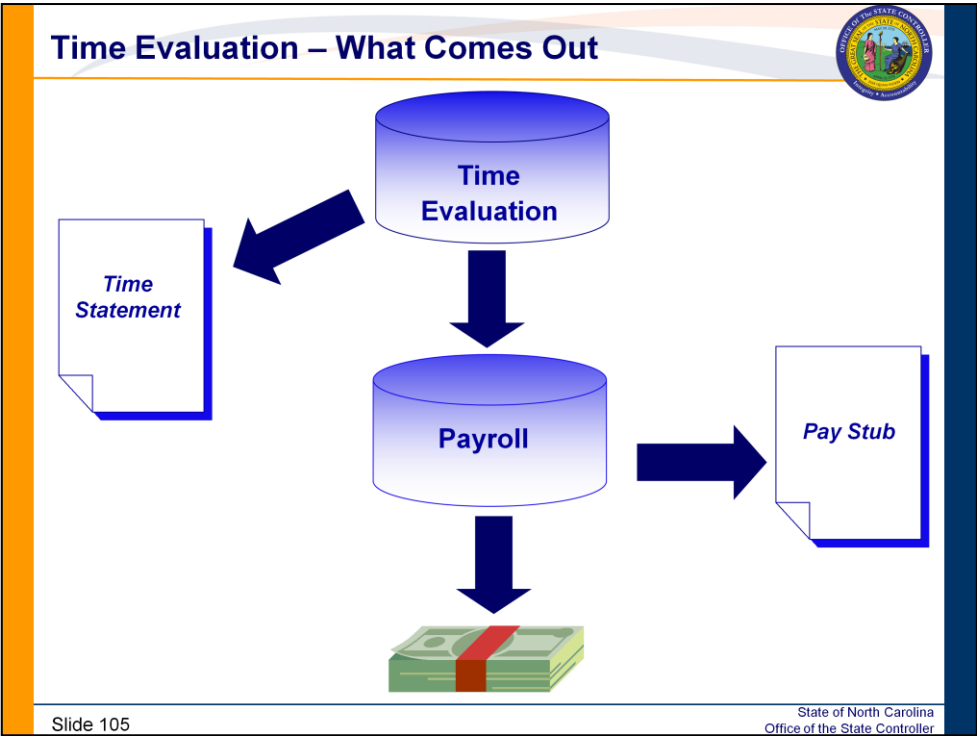
**Notes:**

Time Evaluation Messages

**Time Evaluation Messages Display**

| Mes... | Message long text | PersNo. | Name | CD | Logical date |
|--------|-------------------|---------|------|----|--------------|
| 00 | Employee at work although OFF | 70207946 | Mary Norris | SA | 07/07/2007 |
| 08 | At work despite day type "1" | 70207946 | Mary Norris | MO | 12/25/2006 |
| | At work despite day type "1" | 70207946 | Mary Norris | TU | 12/26/2006 |
| | At work despite day type "1" | 70207946 | Mary Norris | MO | 01/01/2007 |
| | At work despite day type "1" | 70207946 | Mary Norris | MO | 01/15/2007 |
| | At work despite day type "1" | 70207946 | Mary Norris | FR | 04/06/2007 |
| | At work despite day type "1" | 70207946 | Mary Norris | MO | 05/28/2007 |
| | At work despite day type "1" | 70207946 | Mary Norris | MO | 09/03/2007 |
| B9 | 50% not reached no leave accrual | 70207946 | Mary Norris | SU | 12/31/2006 |
| | 50% not reached no leave accrual | 70207946 | Mary Norris | TH | 05/31/2007 |
| | 50% not reached no leave accrual | 70207946 | Mary Norris | SU | 09/30/2007 |
| ZD | Positive time - Hours not entered | 70207946 | Mary Norris | SA | 11/24/2007 |

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**Notes:**

One of the primary responsibilities of the Time Administrator will be to review the error log generated during Time Evaluation.

This is accomplished via the Time Evaluation Error Messages transaction (PT_ERL00).

**Tip:** Time Administrators can save time generating this report by setting up a Variant containing the Personnel Numbers of the employees that they monitor in their agency and the messages that require action .

**5:1 - Walkthrough**

**Display Time Evaluation Messages – PT_ERL00**

- You wish to view Time Evaluation error messages for two employees.

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**Notes:**

Refer to your exercise guide for step-by-step instructions for this walkthrough.

When executing this report it is recommended to use only the relevant period unless specifically troubleshooting a single employee due to the large number of records.

## Research Common Time Evaluation Errors

| Msg Type | Description | Required action |
|----------|-------------|-----------------|
| 01 | Employee not at work | Scheduled, but no entry was made. Check Entries |
| 35 | Locked/Unlocked records exist | Employee was not processed |
| A2 | Holiday not taken | Must determine if Holiday WAS taken, or WORKED. Correct timesheet OR contact the Leave Admin |
| B3 | Education emp not on ED calendar | A 10 or 11 month employee on the wrong calendar will be improperly compensated |
| B1, B5, B6 | Not eligible for premium | (all types) Need to check employees Time Management Settings on Time Statement |
| B7 | Minimum reqd hrs not recorded | Employee will be docked when LWOP is recorded. Check entries |
| B9 | 50% not reached no leave accrued | Employee has not achieved 50% of work schedule and therefore has not accrued leave. Check entries for accuracy |
| ZV, ZW, ZX | Must reconcile liability | Employee liability (weather, vacation, or illness) is a year old and must be reconciled |

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**Notes:**

Contact the BEST Shared Services Center if you encounter errors that you are unable to resolve.  Messages will recur until they are resolved, therefore it is important to monitor them on a regular basis.

## Knowledge Check

1. True or False – Time Evaluation occurs automatically during a nightly batch run.

2. Which of the following is correct?
   - A – Time Evaluation does not affect leave accrual
   - B – Time Evaluation is run by every Time Administrator
   - C – Leave Administrators must calculate and enter quota balances after reviewing Time Evaluation reports
   - D – None of the above

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**Notes:**

**Lesson Review**

In this lesson, you learned to:

– Describe time evaluation

– View common time evaluation error messages

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**Notes:**

## Course Map

Lesson 1: Overview

Lesson 2: Quotas and System Behaviors

Lesson 3: Time Recording

Lesson 4: Advanced Time Reporting

Lesson 5: Time Evaluation

**Lesson 6: Reporting and Troubleshooting**

Lesson 7: Connecting the OSC HR/Payroll Dots

Lesson 8: Course Review

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**Notes:**

## Lesson Objectives

Upon completion of this lesson, you should be able to:

- – Perform time reporting in SAP

- – Perform time troubleshooting

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**Notes:**

## About Troubleshooting

**PRACTICE**
This lesson is designed to introduce troubleshooting. After class be sure to practice and explore.

**BE PATIENT**
Troubleshooting is a skill that is honed over time – don't be alarmed if you don't feel like an expert at the end of class.

**IT GETS EASIER**
As you become more familiar with the OSC HR/Payroll system, data, processes, and transactions your comfort with troubleshooting will increase.

**DON'T WORRY**
The transactions discussed in this topic are displays and reports. They don't update or change data so running them will not "hurt" anything.

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**Notes:**

## Time Statement

- Summary of all time data entered for an employee during a specific period
- ESS time users will be able to view time statements online
- Time Administrator can print Time Statements for employees as needed
- Used to view Leave Offsetting

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**Notes:**

The Time Statement provides a summary view of Time Evaluation results for an employee for a specified calendar month. It is not a pay slip, nor does it reflect compensation.

> *NOTE: Please note that this period of time does not align exactly with Overtime Periods.*

The Time Statement gets its data from Time Evaluation results. If Time Evaluation has not run for an employee for a particular month, the Time Statement will still generate using transaction ZNCTIME, but there will be no data to display on the form. In ESS, an employee will receive a message indicating "Time Statements not available."

If the time data for a month is incomplete or Time Evaluation has not been run for all of the month, some data is displayed, but will not be complete. The data shown on the Time Statement will update after time data changes have been processed by Time Evaluation.

Any retroactive processing of Time Evaluation could change the Time Evaluation results and therefore cause changes to the data shown on the Time Statement. It is best to run the Time Statement again whenever you want to analyze the data that it provides. This will insure that you have the most recent results available.

For further information and field descriptions, you can access the *Time Statement* job aid in the Time folder on BEACON Help.

**6:1 - Walkthrough**

**Display Time Statements – ZNCTIME**

- An employee complains that their premium pay did not come through on their pay check. Research the issue by first checking their time statement for hours worked and possible leave offsetting.

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**Notes:**

Refer to your exercise guide for step-by-step instructions for this walkthrough.

This walkthrough covers one-third of the troubleshooting of premium pay.  After viewing the time statement you must view CATS entries in CATS_DA or CAT3 and then check the work schedule/substitutions in PA61.

**6:2 - Walkthrough**

**Display Working Times – CATS_DA**

- You need to view a report showing the employees recorded working times.
- Examine the following:
  - Sorting
  - Filters
  - Subtotals

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Refer to your exercise guide for step-by-step instructions for this walkthrough.

**Notes:**

**6:3 – Walkthrough – Display Time Statement Form**

**Display Time Statement Form – PT_EDT_TEDT**

- You need to view a report showing an employee's time statement

- Examine the following:
  - Position
  - Quotas
  - Time Evaluation Errors

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Refer to your exercise guide for step-by-step instructions for this walkthrough.

**Notes:**

## Troubleshooting Premium Pay Issues

1. Time Statement (ZNCTIME) – Check employee's time statement to see if a leave offset was made.

2. Display Employee Position Settings (PO13D) – Check Time Management Settings to see if employee is in an overtime eligible Position.

3. Display Working Times (CATS_DA or CAT3) – Check for leave in same period which may result in an offset.

4. Substitution (PA61) – Check to see if a substitution shows in their work schedule.

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**Notes:**

*NOTE:  If these troubleshooting techniques do not help resolve the issue, contact the BEST Shared Services Time team.*

## Work Schedule Errors and Implications

| Error | Implications |
|---|---|
| Employee listed incorrectly on days instead of evenings or nights | Hours entered will not receive premium pay. |
| Employee scheduled for 5x8s instead of 4x10s. | Employee will be unable to record a full day's absence when recording leave. |

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**Notes:**

## Time Settings Errors and Implications

| Error | Implications |
|---|---|
| Employee didn't receive premium pay | Position not flagged as eligible, or improper work schedule assignment, or time not properly coded. |
| Employee didn't receive Callback pay | Position not flagged as eligible or improper time code. |
| Employee didn't receive Comp Time | Position not flagged as eligible, or leave time may have offset additional hours worked. |

**Position Settings are managed by the HR Master Data Maintainer**

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**Notes:**

## A/A Code Errors and Implications

| Error | Implications |
|---|---|
| A code is entered that is invalid | System will require that the entry be corrected or deleted before proceeding. |
| A premium code is entered and the employee isn't eligible | If premium codes are used and the employee is not eligible, Time Evaluation will ignore the premium code. |
| An A/A code is used and the employee isn't eligible | If the Callback code is entered and the employee isn't eligible the employee will not receive Callback compensation. |
| A code is used for a quota that doesn't have sufficient balance | On save, system will indicate errors that must be corrected before saving the timesheet(s). |

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**Notes:**

## Premium Code Errors and Implications

| Error | Implications |
|---|---|
| Employee coded for premium when not eligible | Employee will not receive premium pay UNLESS the Position they hold is eligible. |
| Employee is substituted and still enters a premium code | Premium will not double up, it is an either/or, not an additive behavior. |

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**Notes:**

**Lesson Review**

In this lesson, you learned to:

– Perform time reporting in SAP

– Perform time troubleshooting

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**Notes:**

**Course Map**

Lesson 1: Overview

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Lesson 8: Course Review

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**Notes:**

**Lesson Objectives**

Upon completion of this lesson, you should be able to:

- Identify how information in time or scheduling infotypes can affect employee pay

- Describe how a work schedule assignment affects an employee's pay

- View time settings for a position

- Explain when to notify payroll regarding changes in settings

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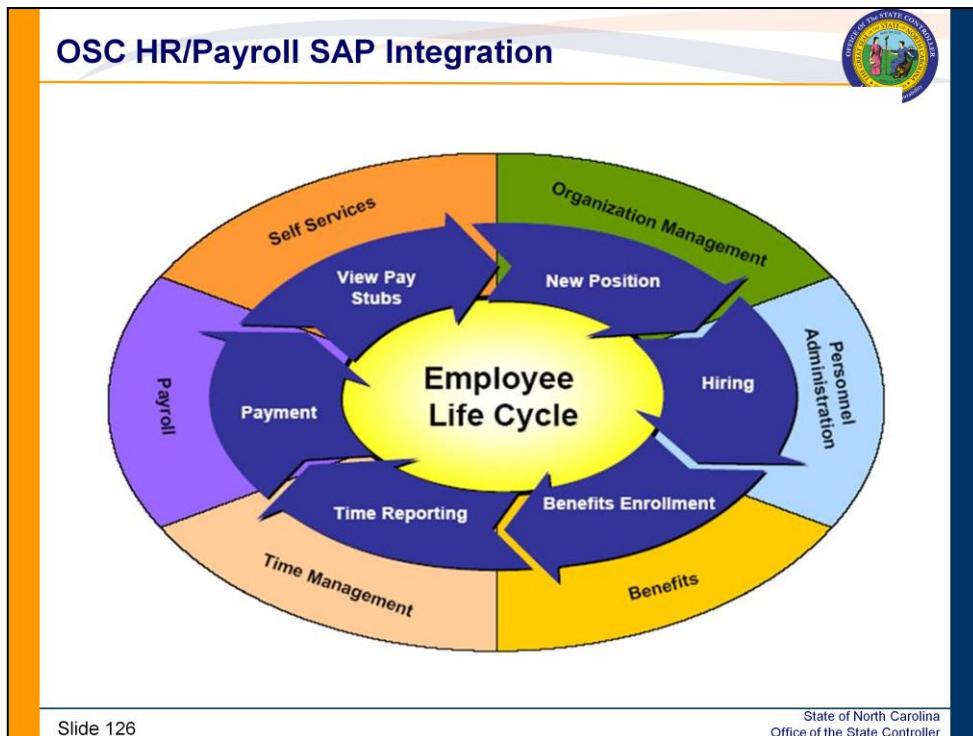
**Notes:**

**Notes:**

Because OSC HR/Payroll is an integrated system, entries made in one module affect other system components, such as an employee's time and pay.

Some infotypes entered are tied directly to the employee, like work weeks, schedules, addresses, and tax withholding information. Other infotypes are applied to the position and affect things like how OSC HR/Payroll looks at holidays, overtime, and premium pay. OM, PA, BN, and TM settings all can affect an employee's paycheck.

## PA Infotypes and Time, Benefits, Payroll

- IT0000 - Actions
- IT0001 – Organizational Assignment
- IT0002 – Personal Data
- IT0006 – Address (permanent)
- IT0007 – Planned Working time
- IT0008 – Basic Pay
- IT0041 – Date Specifications
- IT0552 – Time Specification/Employ. Period
- IT2003 – Substitution
- IT2001 - Absences

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**Notes:**

To understand some of the interconnection between OSC HR/Payroll modules, we need to look at how some of the infotypes from one area may affect processing in another. For example, the infotypes listed above are entered in PA, but affect an employee's time, benefits and payroll.

The next few slides give some details on some of these interconnections.

PA Infotypes and Time, Benefits, Payroll

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**Notes:**

Time, Payroll and Benefits use information from IT0000 and IT0001.

- **Actions IT (0000)**: Employment status (Active, Inactive, Withdrawn).
- **Org Assignment IT (0001)**: Employee Group, Employee Subgroup, Personnel Area, Personnel Subarea, and Payroll area.

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**Notes:**

**Personal Data IT0002**

Social Security number, date of birth and marital status

**Addresses IT0006**

Tax infotypes (Residence Tax, Work Tax Area, Unemployment State) are associated with IT0006 – permanent address.  If IT0006 is skipped during the New Hire Action, the tax infotypes do not display, and the employee's record will error out in payroll.

If the address information is incorrect:

- a separated employee does not receive his or her final paycheck.
- An employee may not receive W2s at the end of the year.

**PA Infotypes and Time, Benefits, Payroll**

- Work Schedule Rule Example (D01N08GN)
- D = Days
- 01 = Schedule number
- N = No weekends
- 08 = Hours per day
- GN = General Schedule (common schedule)

- Weekly working hours drives benefits

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**Notes:**
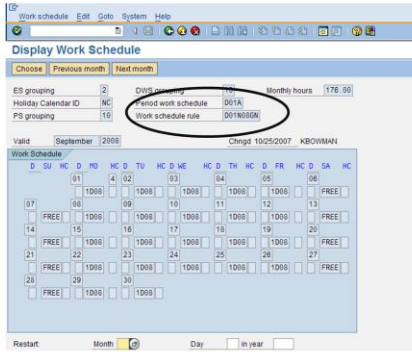
**Planned Working Time**: The Work Schedule Rule (WSR) is the foundation on which an employee's time is processed in SAP. Each employee is assigned a WSR that best represents his or her work pattern. The WSR combines an assigned holiday calendar (the main State holiday calendar or an alternate calendar approved by OSP) with a repeatable pattern of work representing an employee's scheduled work days and scheduled non-work days. The WSR can represent work patterns repeated over single or multiple weeks and may include day, evening, and night shift designations that trigger premium payments at rates designated for the employee's position (as set for the position in OM).

The WSR does not limit the number of hours an employee may record on any given day, but only allows leave to be taken on scheduled work days. Many fields trigger other time functions. For example, Time Sheet Defaults, IT0315 (from PA20) are directly related to the Time Management Status field on IT0007. A Time Mgmt Status of *1* indicates that a time sheet is required (positive time), and *9* indicates a Time Sheet is not required (negative time). If a negative time employee is on Leave of Absence, IT0007 must be revised to change the employee to positive during the Leave and changed back to negative on Reinstatement.

Negative time employees should be employees who work 5 days a week, 8 hours a day.
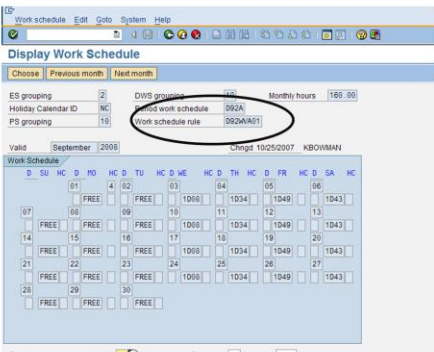
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**Notes:**

**Example of IT007 Impacts Employee's Pay**

This example describes two employees hired on the same day but given two different work schedules. Both employees are paid $6,250 monthly salary.

Employee **A** starts on Sept 19 and is assigned work schedule D01N08GN which has 22 possible work days in the month. Counting Sept. 19th , the employee worked 8 days of the possible 22. The Pay is figured by this formula:  8 days divided by 22 times the monthly rate ($6,250) = $2,272.73 paid for the month for Employee A (based on IT0007 and IT0008).

Employee **B**'s work schedule (D92WVA01) has 16 possible work days in the month. Counting the first day Employee B reported to work (9/19), the employee worked 6 out of the 16 days. The number of days worked (6) divided by the possible work days (16) times the monthly salary ($6,250) calculates a pay of $2,343.75.

You can see that both employees were paid correctly, yet the specific work schedule, and  Basic Pay (IT0008), determined two different pay amounts. This shows how schedules entered in PA can affect employee pay. Note that, unless the employee has a significant number of days without pay (A/A Type 9400), this discrepancy would only affect the first and last months that an employee is on a certain schedule.

**PA Infotypes and Time, Benefits, Payroll**

Display Basic Pay (0008)

Salary amount | Payments and deductions

| | | | | |
|---|---|---|---|---|
| Personnel No | 80000327 | Name | Kumar Reinaldo02 | |
| EEGroup | A | SPA Employees | PersA | 4601 Cultural Resources |
| EESubgroup | A1 | FT N-FLSAOT Perm | Statu | Active |
| Start | 01/01/2008 to | 12/31/9999 | Chng | 06/09/2008 ECATT |

Subtype 0 Basic contract

Salary

•Reason field must be entered

| | | | | |
|---|---|---|---|---|
| Reason | Z0 | New Hire | Capacity Util. Level | 100.00 |
| PS type | 01 | Graded | Work hours/period | 173.33 Monthly |
| PS Area | 01 | Annual Salaries | Next increase | |
| PS group | 6R68 | Level 6R | Annual salary | 35,500.00 USD |

•Other fields default from position

| Wa | Wage Type Long Text | O | Amount | Curr | I | A | Number/Unit | Unit |
|---|---|---|---|---|---|---|---|---|
| 1000 | Regular Salary | | 2,958.33 | USD | | ☑ | 0.00 | |

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**Notes:**

**Basic Pay**: Salary or hourly wages

The **Salary Amount** button does not calculate correctly for DOT employees, but does calculate for all non-DOT wage types. You must manually enter information in the Reason field during the Action. The remaining IT0008 fields default from the PCR for a salaried employee. In the case of an hourly employee, you must enter the hourly wage in the Amount field.

You would seldom make an entry directly on IT0008. Most of the adjustments involving an employee's pay would result from an Action. However, one example of when it is appropriate to make a direct adjustment to IT0008 is when an employee returns to work part-time while receiving partial Worker's Comp.

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**Notes:**

### Date Specifications IT0041

Time Evaluation bases leave accruals and longevity payments on dates contained on IT0041 so they must be an accurate reflection of the employee's State career. Supplemental Staff employees will not have an IT0041. Initially the Original Hire Date and Agency Hire date are the same. If an employee has a Reinstatement Action (either the employee was on Leave of Absence (LOA) and returned, or left State employment and returned), or Transfer Action, the Agency Hire date will automatically reflect the date of the Reinstatement or Transfer Action.

### Time Specification/Employ. Period IT0552

Creditable service earned prior to OSC HR/Payroll must be entered on IT0552. Once an employee is entered into OSC HR/Payroll, the system automatically calculates service and longevity dates using the Time module. If HR makes changes to IT0552 that affect the longevity date, OSC HR/Payroll will take back any money already paid out and repay based on the new longevity date. If you make a change on IT0552, you must email BEST with the name of the employee. Do not adjust the original IT0552 entry from conversion. If an employee has creditable service from more than one organization, enter additional IT0552s to add the additional organizations, rather than extending the date on the original IT0552 to include the additional service dates.

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**Notes:**

The Substitutions infotype is used to indicate that the employee is working something other than his or her regular schedule. Substitutions may be daily or for weeks at a time. IT0007 – Planed Working Time is <u>overwritten</u> with the properties of the Substituted schedule. Some examples include:

- An employee is working at a time other than his or her planned work schedule. For example: employee works on day off, or works on a shift that has a different premium (or has no premium) than his or her usual shift.

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**Notes:**

Leave of Absence (LOA) is covered in *PA420 Leave of Absences*, but you should be aware of how the LOA Action affects an employee's time.

**Notes:**

The Absences infotype (IT2001) indicates the number of hours the employee wants to exhaust for leave while on Leave of Absence or the number of hours the employee is taking unpaid leave.

**Because OSC HR/Payroll is integrated, the hours entered on the Create Absences infotype are fed directly to payroll. A time sheet does not have to be entered.**

As long as the employee is receiving pay (leave or work), benefits continue to be deducted. If not receiving pay, the employee must pay for benefits or discontinue them.

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**Notes:**

If the employee is exhausting leave during a time that includes a holiday, additional IT2001 infotypes will be necessary to allow the employee to take holiday leave. For example, assume an employee is going out on military leave on July 1 and wants to exhaust 160 hours vacation prior to beginning the military 30 days. In this scenario, there is one holiday period (7/4). Your entries would be as follows:

1. During the LOA Action, on the Absences (IT2001) infotype subtype 9000, you will enter the dates for the leave to be exhausted **up to** the holiday period in the Start and To fields:

   Start: 7/1/2008      To: 7/3/2008 (24 hours **leave**)

2. Create a PA30 to enter the first holiday period, infotype 2001, subtype 9300:

   Start: 7/4/2008      To: 7/4/2008 (8 hours **holiday**)

3. Create a PA30 to enter the remaining leave, infotype 2001, subtype 9000:

   Start: 7/5/2008      To: 7/28/2008 (136 hours **leave**)

**Position Infotypes - Employees and Time**

Position flags set on specific infotypes also affect employee time and pay

- Overtime Compensation – IT9005
- Holiday Payout Period – IT9006
- Night Shift Premium – IT9007
- Evening Shift Premium – IT9008
- Weekend Shift Premium – IT9009
- Holiday Premium Rate – IT9010
- On-Call – IT9011
- Callback – IT9012
- Gap Hours- IT9017

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**Notes:**

HR personnel with access to PO13 will update the above infotypes for a position. If the position infotypes for the types of pay are not flagged correctly, even if hours are entered, released, and approved, the employee will not receive the correct pay.

If you **revise** a **position** setting that is **retro** to a pay period before the current pay period, you **must contact BEST Payroll** to let them know to run time evaluation on the affected employees retro to that same time period. You only need to contact BEST Payroll if you revise a position. If you revise time for an employee, OSC HR/Payroll automatically runs time eval and adjusts the time records.

*NOTE:  If a position is revised, an email should be sent to BEST Shared Services.  In the subject line, type "Retro Time Evaluation."*

In Organizational Management, the infotype codes do not display like they do in PA. To see the infotype number in PO13, select the infotype, and then click the "Activate infotype" button at the top of the screen. The infotype number will display in the message at the bottom of the screen.

**Activate Infotype button:**

Overtime Compensation

Create Overtime Compensation

| Position | 800904000836 Museum Specialist |
| Planning Status | Active |
| Validity | 08/20/2008 to 12/31/9999   Display change infor |

Overtime Compensation   01 S 65001751 1

OT Compensation Eligible   ☑
Immediate Payout   ☐   OR   Comp Aging Limit   365 Days

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**Notes:**

### Overtime Compensation (IT9005)

If time worked beyond the overtime limit (40 hours, etc.) is to be paid or accumulated as compensatory time, the position must have a valid IT9005 record.  If overtime compensatory time is to be paid out (FLSA Subject only) or expired (FLSA Not-subject only) at a point earlier than 12 months from when it was earned, the Comp Aging Limit field should be populated with the corresponding number of days (30 days, 60 days, etc.). If it is to be paid out immediately, the Immediate Payout checkbox should be checked. The default is 365 days. The setting on IT9005 works with IT2012 (discussed later) determine the rules for overtime compensation.

As indicated previously, an employee may have worked more than 40 hours and entered and released the time. Even if the time is approved by the manager, if the Overtime Compensation infotype is not flagged correctly for the position, the employee will not receive overtime compensation. An IT9005 record is not required if the position is not eligible for overtime pay or compensation.

Holiday Payout

Create Holiday Payout Period

| | | |
|---|---|---|
| Position | 800904000836 Museum Specialist | |
| Planning Status | Active | |
| Validity | 08/20/2008 to 12/31/9999 | Display change infor |

Holiday Payout Period   01 S 65001751 1

Immediate Payout ☐     OR     Comp Aging Limit   365 Days

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**Notes:**

### Holiday Payout Period (IT9006)

If holiday compensatory time (equal time off for time worked on a holiday) is to be paid out at a point earlier than 12 months from when it was earned, the Comp Aging Limit field should be populated with the corresponding number of days (30 days, 60 days, etc.).  If it is to be paid out immediately, the Immediate Payout checkbox should be checked.

The default is 365 days. If no record exists, the default value of 365 applies.

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**Notes:**

Positions eligible for any of the premiums listed below must have valid infotypes.

### Night Shift Premium (IT9007)

OSP approved rates other than the default of 10% must be entered in the Rate field.

### Evening Shift Premium (IT9008)

OSP approved rates other than the default of 10% must be entered in the Rate field.

### Weekend Shift Premium (IT9009)

OSP approved rates other than the default of 10% must be entered in the Rate field.

The various types of premium pay display as separate line items on the employee's pay stub only if the rates are different. For example, if an employee's evening and night shift are both 10%, the hours worked in the evening and night are together on one *Shift Premium* line item on the pay stub. On the other hand, if the evening rate is 10% and the night is 15%, two separate line items will show with the hours entered for the evening separate from the hours entered for night.

**Holiday Premium Rate (IT9010)**

IT9010 is only required if the Holiday Premium Rate is different than 50%.

OSP approved rates other than the default of 50% must be entered in the Rate field.

**Notes:**

**On-Call (IT9011)**

Positions eligible for On-Call compensation must have a valid IT9011 record.

The accrued box should be checked if the time is to be collected as On-Call comp time. The Rate field must be populated with the OSP approved on-call rate.

**Notes:**

### Callback (IT9012)

Positions eligible for Callback compensation must have a valid IT9012 record. The decision to pay versus comp time is determined by the Callback Accrual checkbox.

**Notes:**

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**Gap Hours IT9017**

Positions eligible for Gap Hours Comp must have a valid IT9017 record. The decision to pay versus comp time is determined by the Gap Hours Accrual checkbox.
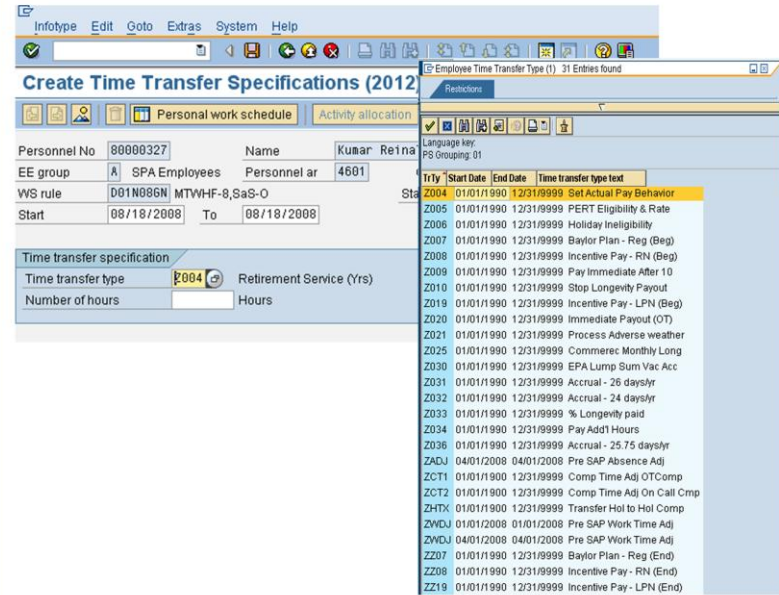
Gap Hours are additional hours for Subject- FLSA employees.  The "Additional hours" are those hours caught in the gap between the minimum hours of work required and the overtime threshold. These hours are currently being paid at an hour-for-hour rate for Subject-FLSA employees.

**Notes:**

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The Time Transfer Specifications infotype (IT2012) can be used to influence time management behavior and is typically applied to an employee by the Time Administrator. Infotype 2012 records are created for specific employees for specific periods of time. The HR Master Data Maintainer should understand the following subtypes for the time infotype 2012:

**Z004 - Set Actual Pay Behavior**

Applicable for positive time/exception pay employees. This subtype record will cause the generation of leave without pay wage types to fill the difference between reported hours and planned hours. This causes the employee to be treated as a positive time/actual pay employee.

**Z005 - PERT Eligibility and Rate**

Applicable for DOC employees eligible for PERT (Prison Emergency Response Team) premiums

**Z006 - Holiday Ineligibility**

This subtype record will cause the suppression of Holiday Premium Pay during the validity period specified.

**Notes:**

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**Notes:**

**Z007 - Baylor Plan – Reg (Beg)**
**ZZ07 - Baylor Plan – Reg (End)**
Applicable RNs working under a regular Baylor Plan contract

**Z008 - Incentive Pay – RN (Beg)**
**ZZ08 - Incentive Pay – RN (End)**
Applicable RNs working under an Incentive Pay contract

**Z009 - First 10 hrs Comp**
Applicable for subject employees who have a position with a Overtime Eligibility (IT9005) record that does not indicate "pay immediately". This subtype record will cause the additional hours worked beyond 50 in a week to be paid immediately. The first 10 hours of additional time worked will be compensated with Compensatory Time at the appropriate rate.

**Knowledge Check**

- Identify how information in time or scheduling infotypes can affect employee pay

- Describe how a work schedule assignment affects an employee's pay

- View time settings for a position

- Explain when to notify payroll regarding changes in settings

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**Notes:**

**Lesson Review**

1.  True or False:
    -- Except for IT0008 Basic Pay, infotypes created in the PA module do not affect the PY (payroll) module.

2.  True or False:
    -- Work schedules affect leave accruals.

3.  True or False:
    -- Infotypes may apply to positions or to employees.

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**Notes:**

## Course Map

Lesson 1: Overview

Lesson 2: Quotas and System Behaviors

Lesson 3: Time Recording

Lesson 4: Advanced Time Reporting

Lesson 5: Time Evaluation

Lesson 6: Reporting and Troubleshooting

Lesson 7: Connecting the OSC HR/Payroll Dots

**Lesson 8: Course Review**

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**Notes:**

## Course Review

You should now be able to:

- Describe Time Administration process
- Describe time Roles and Responsibilities
  - Time Administrators vs. ESS
- Define new time recording terms and concepts
- Describe how work schedules may affect quotas and pay
- Identify new time codes using the Time Administration Quick Reference Card
- Review work schedules
- Describe premium pay eligibility
- Record, review, and correct time in SAP
- Describe system behaviors
- View common time evaluation error messages
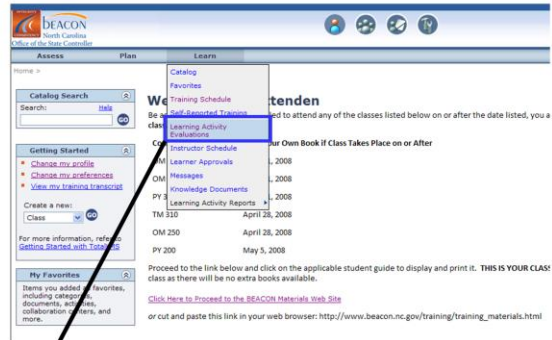- Perform general time reporting and troubleshooting

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**Notes:**

Slide 152 — Level 1 – Course Evaluation

**Notes:**

**Level 1 Evaluations**

The Level 1 evaluation classes is accessed as shown above (**Learner Home Page > Learn > Learning Activity Evaluations**).

Ask your instructor if you have any difficulty accessing the course evaluation.

**Next Steps**

## Monitor OSC HR/Payroll communication
– BEST Shared Services web site (especially the Updates tab)
  • URL: http://www.osc.nc.gov/BEST/
– BEACON Training website:  **What's New link**
  • URL: http://www.beacon.nc.gov/training/whats_new.html

## Review conceptual materials

## Access BEACON Help
– Access from an SAP transaction
  • URL: http://help.mybeacon.nc.gov/beaconhelp

## Practice what you've learned
  • URL: https://mybeacon.nc.gov
– Client 899
– Use your current NCID user name and password

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**Notes:**

Continue to monitor updates on the BEACON University website for information regarding any future training that you are scheduled to attend.

Keep your training materials close by as a ready reference.

**Want to practice what you have learned from your desk?**

• Follow the link provided above to access the training client on the BEACON website. The training client is number 899.  Your current NCID user name and password are used to access the practice environment.

**Need transactional assistance after go live?**

• Remember to access BEACON help when you need assistance in completing transactions. As stated above, the work instructions can be accessed either on line or by clicking on BEACON help from within an SAP transaction.

**Notes:**